

PROPOSAL PART B

ICT PSP fourth call for proposals 2010 Thematic Network

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Proposal acronym: Ev2

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PROJECT PROFILEProposal acronym: Ev2Proposal full title: Europeana v2.0**Information on the Thematic Network****Objectives**

The aim of this Thematic Network is to provide the majority of the funding required to ensure the continued running and development of Europeana from August 2011 to December 2013. Activities will include the enhancement of content, will increase and facilitate the re-use of content, develop a sustainable finance and provision model, create centralized repositories of linguistic resources, release new versions and maintain the service and its APIs, develop features and functionalities, improve the user experience and coordinate the network of contributing organisations. The ingestion of content from projects and relationships with future projects, funded under the former eContentplus programme and ICT PSP contributing content to Europeana will be undertaken on terms to be specified in the DoW of each new project, which should be in accordance with the basic requirements of Europeana.

Activities and Outcomes

Its main remit is to run and develop the business of Europeana.eu as a portal and provider of services. To do this it will continue to tackle the key issues, of multilingualism, interoperability, IPR, collaboration, sustainability from regional to international levels.

Its core activities will be:

- Reaching out to end users
- Quality enhancement, increase and re-use of content,
- Further development of a sustainable finance and provision model,
- Encouragement of the vision of a common and diverse European Culture
- Enabling policies for digitization and access of Europe's cultural & scientific heritage.
- Release of new versions of the core portal code
- Maintenance of the service and its APIs,
- Development of user driven features and functionalities,
- Coordination of the network of contributing organizations and European projects
- Knowledge transfer

The outcomes are expected to be:

- A service and content used by users
- Better quality metadata to enhance discovery of content
- New creative services built on the content
- A sustainable service and structure for digital cultural heritage
- Policies to aid the free flow of European cultural and scientific heritage
- Regular releases of Europeana.eu responding to user demand
- A robust, stable portal and API's facilitating the use of the aggregated content elsewhere
- User centric development of the portal and web 2.0 relevant social networks to maximize access to the content

- A cohesive, collaborative network that spawns new ideas and developments
- The transfer and reuse of knowledge within and without the network

As in Europeana v1.0, the Europeana Office will facilitate the ingestion of content from and relationships with future projects funded under the former eContentplus programme and ICT PSP but contributing content to Europeana will be on terms to be specified in the DoW of each new project, and in accordance with the basic requirements of Europeana.

Consortium

The Europeana Foundation coordinates Europeana v1.0 and is responsible for Europeana.eu. It will have the same role in Ev2.

Overall there are 10 project partners. Europeana Foundation is the project coordinator as it was for Europeana v1.0. CNR-ISTI is responsible for the hosting and maintenance of EuropeanaLabs, a task done in Europeana v1.0. The National Library of Austria (ONB) is leading the Innovation Work Package (WP7). ONB has a long record of involvement in research projects in the digital libraries area, including managing Europeana Connect, the main technology provider project of Europeana v1.0. Humboldt University and Beeld en Geluid are the task leaders, in this work package, responsible for driving developments in the areas of multilingualism, semantic technologies and end-user services. Finally, besides the British Library, which leads WP4 on corporate communications, there are three more partners involved in WP4, the Ministry of Culture of Spain, the National Library of Poland and the Department of Arts, Sport and Tourism in Ireland. Each will organise a Europeana branded conference on digitisation and access to cultural heritage in their respective countries, the latter two in the framework of the EU presidency (Poland 2011, Ireland 2013). INA will undertake Market Revenue Research in WP3.

The existing Europeana V1.0 network has more than 180 members. They mainly consist of libraries, museums, archives, audio visual archives, university researchers and experts and other supporters of Europeana. The network has been crucial to the success of Europeana to date, it provides the lifeblood of Europeana access to the digital and digitized cultural and scientific heritage of Europe and to a wide range of expertise in fields ranging from the semantic web, data modeling and multilingualism.. All of which is provided voluntarily. The contributing organisations do not have budgets or individually defined roles. Contributions and time are given freely and willingly achieving a high level of consensus across the sectors and across the European Union. Ev2 will continue a similar open framework allowing new members to join the network when it is launched and during its period of activity. It is anticipated that existing members of Europeana v1.0 will transfer and new ones will also join.

Impact

In line with the Work Programme Ev2 will in addition to the objectives above:

- Facilitate the operation and development of Europeana for enriched content and improved functionalities,
- Improve user satisfaction,
- Achieve better coordination and enlargement of the networks of contributing organisations

B1. Relevance

B1.1. Project description and objectives

Background

Europeana – Europe's online library, museum and archive – opened in November 2008 as part of the Commission's digital libraries initiative. The European Parliament and the Council have highlighted the importance of Europeana both as a showcase of the cultural heritage of the Member States on the web and to provide access to that heritage for everyone. At the same time they underlined the economic potential of making cultural treasures available online as a source for creativity and new products and services in areas such as tourism and learning.

Europeana aims to make Europe's cultural and scientific heritage accessible to all on the internet and to act as facilitator and innovator for others to create new products and services or enhance existing ones. By mid 2010 it made 10,000,000 digitised objects from all European Union countries accessible. Europeana is run by the Europeana Foundation, a legal entity under Dutch law, housed at the National Library of the Netherlands.

From 2009 to mid-2011 the development of Europeana is co-funded with €6.2 million through the Europeana v1.0 project, selected under the eContentplus programme. In this phase, several Member States as well as a few individual cultural institutions, are also contributing financially. Ev2 is expected to become the principal funding channel for the next phase of development until 2013.

Objectives of the Thematic Network

The aim of this Thematic Network is to provide the majority of the funding required to ensure the continued running and development of Europeana from August 2011 to December 2013. Activities will include the enhancement of content, will increase and facilitate the re-use of content, develop a sustainable finance and provision model, create centralized repositories of linguistic resources, release new versions and maintain the service and its APIs, develop features and functionalities, improve the user experience and coordinate the network of contributing organisations. The ingestion of content from projects and relationships with future projects, funded under the former eContentplus programme and ICT PSP contributing content to Europeana will be undertaken on terms to be specified in the DoW of each new project, which should be in accordance with the basic requirements of Europeana.

Issues to be addressed by the Thematic Network

There are 5 main to areas to address:

- Users, penetration and use
- Content : quality improvement, strategy development and increase in numbers.
- Financial sustainability and coordination of contributing organisations
- Technology including features and functionalities
- Innovation and Facilitation

The following quotation from the Summary Minutes of the 6th meeting of the High Level Expert Group on Digital Libraries 25 June 2009 [p.3] sums up the challenges.

“Europeana represents the most visible achievement of the Digital Libraries’ initiative, and it should be further consolidated and developed. EU institutions, Member States and stakeholders should all provide full support to Europeana, as “European champion” in the digital culture global arena. In doing so, Europeana can usefully take advantage in using and promoting these recommendations from the HLEG.

“A set of challenges has to be addressed to make this project grow further. Firstly: increase participants and digital objects, including in-copyright content through appropriate agreements with rightholders. The target is to reach 10 million cultural objects in 2010. Secondly, there is a need to improve its functionalities by making searching and browsing easier for the users, and incorporating multilingual tools. Thirdly, a major challenge is to ensure long term financial and governance sustainability.”

The press release from the European Parliament on its own initiative report [23rd February 2010] agrees and expresses the issue about balance of content thus:

“Although more than 1,000 cultural institutions already contribute content to Europeana, some Member States contribute much more than others. Only 5% of all digital books are available in Europeana. Almost half (47%) of these come from France; other big contributors are Germany (16%), the Netherlands (8%), and the UK, (8%).”

Furthermore, the ICT PSP work programme 2010 specifically requires the Network to deal with the issues described in the following quotation:

“... to manage the activities contributing to the enhancement of Europeana, the maintenance of its service, the development of its functionalities, improvements in the user experience and to coordinate the network of contributing organisations.” [Page 14].

And

“-Facilitating the operation and development of Europeana for enriched content and improved functionalities,

- Improving user satisfaction,
- Better coordination and enlargement of the network of contributing organisations.” [Page 14].

In the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Europeana - next steps, of August 2009 the Commission also articulates a view of what Europeana needs to do next:

“In the coming years the site will gradually be improved with new functionalities and services and an enhancement of those that already exist. Key issues to be addressed are search features and interfaces. Particular attention will also be given to developing Web 2.0 services to create communities of interest, as well as improving the multilingual features. Input for improving the site has come from a recent survey among Europeana users... While upgrading the site, Europeana will continue to function as a laboratory for testing new ideas and research results. Further promotion of Europeana is needed to make citizens more aware of the service.”

Several of these challenges have begun to be addressed under Europeana v1.0. A bedding in and further development is required for this project.

Users

To date no end user marketing has taken place on Europeana. From mid to end of 2010 this will start to be addressed, to increase penetration in key markets and to ensure use of the content of the cultural heritage institutions of Europe. For Ev2, constant efforts will be needed to keep Europeana before users' eyes and accessible from within their current online working environments. This means that Ev2 will place greater emphasis on the distribution of content into user environments rather than relying on users to come to its portal. The knowledge and technology done by Europeana will be shared with the network so that all cultural heritage becomes more accessible.

Content

Content needs to be increased but more importantly its quality improved both in accuracy of its metadata and relevance to the user. A programme of quality assurance, with the help of the contributing aggregators and their providers, will be put in place. A content development strategy will be created that prioritises quality over quantity but also continues to create a balance across countries and includes more in copyright content, necessitating lobbying for changes to the law on copyright for digitization and redistribution. Additionally User Generated Content is a development area for Ev2. Finding ways of marrying the crowd with the cultural heritage institution, moderating the contributions in multiple languages, storing the data are just some of the challenges to be met to ensure user take up and use of Europeana.

Content targets will be set to meet the Commission's requirements:

"The Commission's policy target is to have **10 million objects** accessible through the site in 2010. The number should multiply in the years thereafter." [Europeana next steps p4].

But with far greater importance attached to the issues of quality and user relevance.

As to better balance, in 2010 the problem is as follows:

"Overall, the contribution by the different Member States to Europeana is still unbalanced, in terms of both number of objects and types of material (see part 2 of the staff working document accompanying this Communication). The major efforts made by France to bring content into Europeana, with a presence of some 47% of all digitised objects, are very visible. Some other Member States contribute only a few objects. This situation will gradually balance itself out as more collections from across Europe are brought into Europeana." [Europeana next steps p4].

Efforts have been made within the Europeana Office to redress these imbalances and we have moved from the position seen in figure 1 to that of figure 2. Continued and renewed efforts to achieve fair representations of a country's digital cultural heritage will be made.

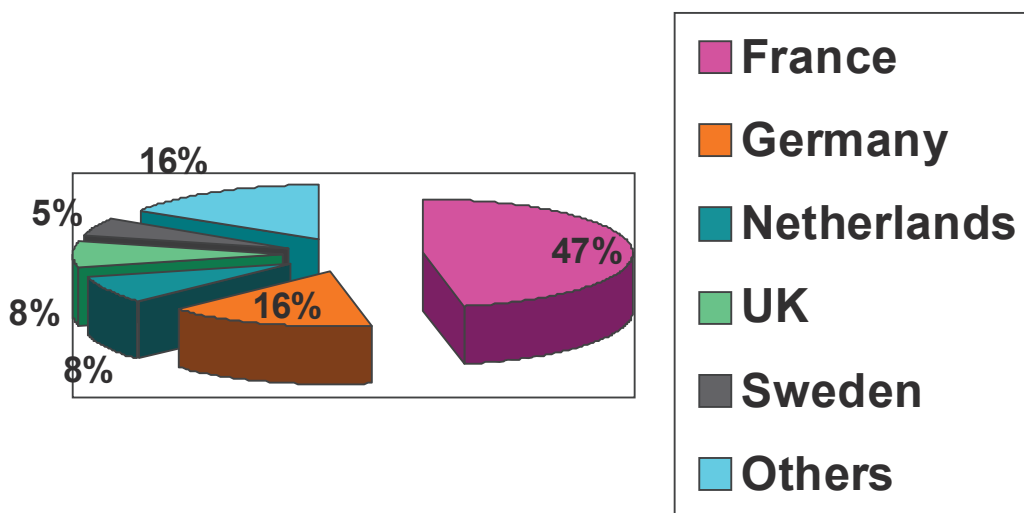


Figure 1: Country representation September 2009

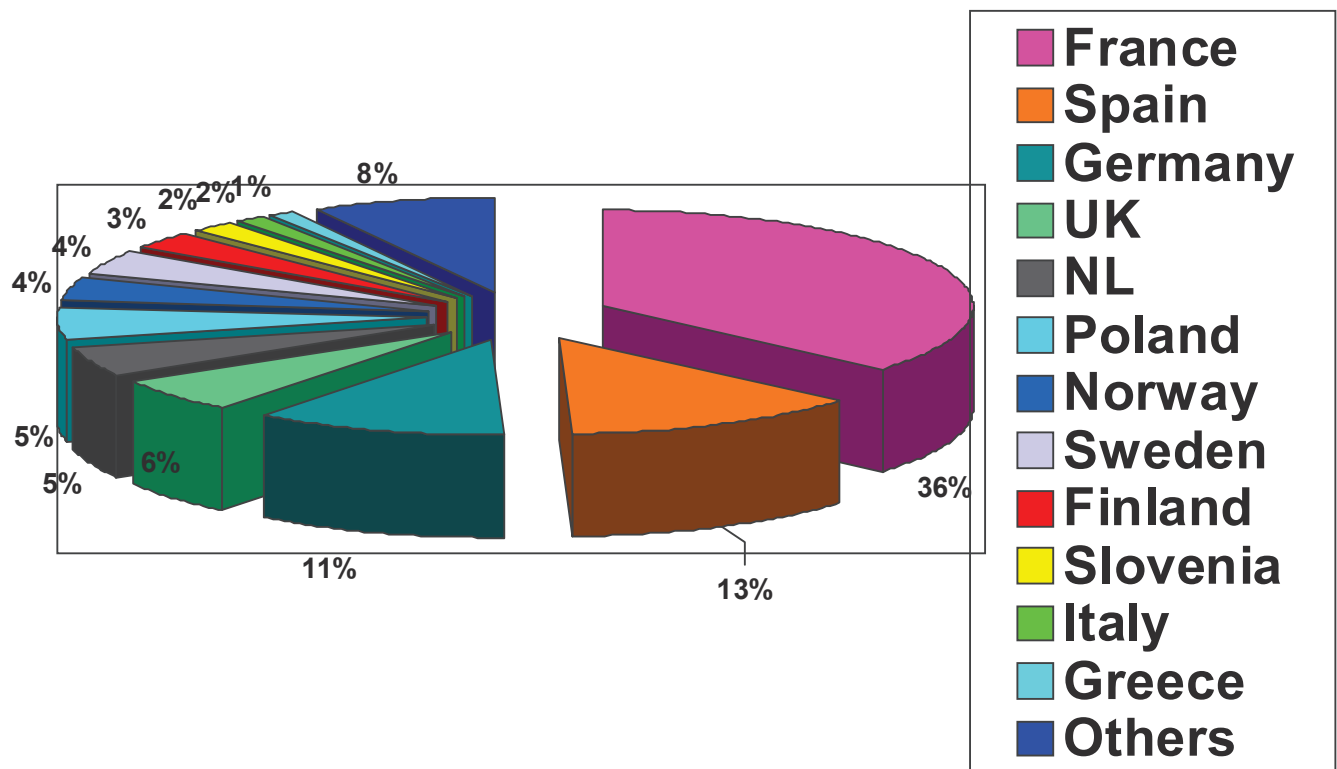


Figure 2: Country representation March 2010

As well as a better balance of country contributions some improvements have been made in the spread from the sectors, increasing the amounts of audio visual, text and archival content. This will be continued under Ev2. By August 2011 when Ev2 begins, progress will have been made in the amount of content accessible via Europeana. Appropriate targets will be set having regard to the position as it will be in August 2011. Actions from August 2011 onwards, are likely to continue existing practice, namely:

- Working closely with aggregators to improve quality and numbers.
- Developing the Council of Content Providers and Aggregators
- Developing a quality plan together with Aggregators.
- Automating the process of delivery of one off collections to Europeana
- Identifying high priority countries and targeting their cultural institutions and encourage them to work with projects and national partners
- Improvements to ingestion tools, in use by Europeana, the Aggregators and content delivering projects.

Europeana should also include collections from the wider Europe, but this will be in a later phase of development, once the countries of the EU are fully incorporated. The cultural and scientific heritage of Europe is closely aligned, for example, with that of the Russian Federation and the former Soviet Union, and users would expect to find not only material about Russia but also from Russia on Europeana.

Copyright

Europeana will give access to paid-for material as well as unpaid, and investigate the possibilities of more generic multilingual payment systems.

In order to encourage Europeana to flourish, and by extension, to encourage digitisation programmes and online access to knowledge, it is vital to revisit EU copyright laws in relation to the web. **Europeana will not have the resources to play an active role in bringing about such changes.** Europeana will, nonetheless wish to include in-copyright material, to avoid a '20th century black hole' —where cultural material from before 1900

is accessible on the web, but there is very little material from the more recent past. The Europeana Foundation will play its part in lobbying for such change making use of its chairman who has been appointed to the Reflection Group of Commissioner Kroes. Her unparalleled access to the content holders via the Europeana Foundation Board will play a role here.

Allied to this are issues with funding for cultural institutions and their digitisation programmes. Pressure on funding digitisation has two consequences which run counter to the Commission's intention in funding Europeana. The first is that institutions set up exclusive licensing deals on long-term contracts in order to get material digitised; the second is that they are forced to maximise the revenue for re-use of digitised content.

Charging for re-use acts as an effective barrier to innovation and start-up creative enterprise. Europeana has played a role in the effort to breaking down these barriers by issuing the Public Domain Charter and looking to favour providers that comply with the Charter in the results table. It will prior to the start of Ev2, work on a User Charter, drawing on the goodwill and social awareness of its users. Europeana, via its Board and Council of Content Providers and Aggregators will continue to lobby governments and institutions to find alternative ways to digitise and ensure free access to all. But once again, Europeana will have to rely on others to break ground on these issues

Sustainability

Europeana's current approach to this issue is found in section B2.2.

There is a dual approach to sustainability.

- Working with the Commission to find a more structural way of funding Europeana post 2013 and
- Developing the concept of Aggregation, thereby distributing the knowledge and investment in Europeana and thus creating a more sustainable pan European model for its future existence.

In the Communication of August 2009 [p.8] the Commission summarised its position in this way:

“Until the end of 2013 the Commission can continue supporting the development phase of Europeana through the Competitiveness and Innovation Programme. There will be some further co-funding by the Member States and/or initial sponsoring by the private sector in this phase.”

“Europeana Next Steps” sums up the issue of continuing public funding for Europeana beyond 2013 as follows: “A Community contribution after 2013 would find its justification in the European added-value of the site and its importance for demonstrating Europe's unity in all its cultural diversity. However, the present project funding, based on open calls for proposals, is not a sustainable basis for financial planning. Alternatives for the basic funding of Europeana need to be considered within the range of available policy instruments.”

The Europeana Foundation agrees with this analysis and will continue to work with key stakeholders towards the establishment of a viable long-term funding model.

Technology, including Features and Functionality

At the time of writing [May 2010] Europeana v1.0 and EuropeanaConnect have more than a year to run and the first operational release of Europeana has not happened. It is therefore impossible to be precise at this stage about what technology or features and functionality will be needed and could practically be added in the period 2011-2013.

Nonetheless, there are recommendations in general terms that Ev2 will follow if appropriate at the time.

Europeana's objectives include these words:

“...the release of major new versions of the service,..... the development of its functionalities, improvements in the user experience...”

The High Level Expert Group [quoted above] recommends “making searching and browsing easier for the users, and incorporating multilingual tools.”

The Europeana Foundation's current thoughts on this are:

Drawing lessons from Google and other sites, the features on Europeana should be minimal in the first 2 years of operation. Europeana should use common features through opportunities presented by Web 2.0, such as the 'Add This' API which allows the user to incorporate Europeana as a favourite site or to save subsets of content to their own college site or Facebook profile.

Europeana should therefore focus on prioritising functionalities rather than features. A priority list would include the following.

- Continued improvement of access through search and browse.
- Multilingualism has to remain a high priority.
- Using crawling technologies for full text material in order to index automatically.
- Cleaning and enriching data so it can be used for geographic and temporal search and browse.

Europeana will follow an iterative release schedule of 1 to 3 releases per year. Moving away from any big bang approach, this will allow for continuous development and the integration of developments when ready, whether from external projects or its own open source environment.

Innovation and Facilitation

A huge priority for Europeana is to continue encouraging innovation and facilitation. It has been successful to date in the creation of an open source environment for development activity, EuropeanaLabs, and it will widen this to full open source development networks. This should encourage innovation and new applications. Such an environment would be fostered and nurtured under Ev2.

Facilitating through knowledge transfer, but also through the provision of centralized repositories for multilingual and ontological work, is a central tenet of Europeana and seen to be a strong value add by the content providers and aggregators across Europe.

B1.2. EU and national dimension

The digital libraries initiative to which Europeana contributes is part of the Commission's **i2010 strategy** for the digital economy.

The Strategy promotes an open, innovative and competitive digital economy and emphasises ICT as a driver of inclusion and quality of life. One of the Strategy's 3 priorities is "Achieving an inclusive European Information Society that is consistent with sustainable development and that prioritises better public services and quality of life." Within this priority digital libraries fits. Europeana is a flagship initiative in this area. To achieve these priorities, i2010 provides financial support. The ICT PSP in the CIP is one of the main financial instruments of i2010.

In 2009 the Commission launched a public consultation to prepare for future policy initiative in ICT beyond 2010. It is likely to continue to provide a hospitable policy context for Europeana. According to the Communication from the Commission **"EUROPE 2020 A strategy for smart, sustainable and inclusive growth"**, published 3rd March 2010, the Commission proposes that the European Council endorses - in March - the overall approach of the strategy and the EU headline targets, and approves - in June - the detailed parameters of the strategy, including the integrated guidelines and national targets. The strategy will include a flagship initiative to be known as "A Digital Agenda for Europe." This will include active support for the digitisation of Europe's rich cultural heritage, an area where Europeana plays a crucial role.

Currently the existing digital libraries initiative supports the development of Europeana – the European digital library – and contributes to improving the conditions for the online accessibility of books, newspapers, films, maps, photographs and archival documents from Europe's cultural institutions.

Commission Recommendation 2006/585/EC on the digitisation and online accessibility of cultural material and digital preservation and the related Council Conclusions set a range of tasks for the Member States to make cultural information accessible to all on the internet and preserve it for future generations. The recommendation included support for a "European digital library", now known as Europeana. By August 2008, in the "Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions, Europe's cultural heritage at the click of a mouse, Progress on the digitisation and online accessibility of cultural material and digital preservation across the EU [SEC(08) 2372]", the Commission was specifically calling for " - Solid support from the Member States for Europeana, ranging from criteria for financing digitisation to setting up national aggregators and work on standardisation."

In the Communication cited above, in August 2008, the Commission was able to list ways in which Member States had supported the Europeana initiative. Many were in the process of setting up national aggregators which can contribute content to Europeana. A few were making direct financial contributions to Europeana's running costs. Some member states [Spain and the Netherlands] make contributing the results of publicly funded digitisation to Europeana a specific funding criterion. Thirteen Member States reported at that time that they had set up or were in the process of setting up national portals. Such portals can have an important role as aggregators for the common European access point, provided that they implement the right standards. A majority of the Member States reported ongoing work in relation to the standards needed to achieve interoperability across Europe. Action was being taken in some Member States to involve private content holders and thus facilitate the availability of in-copyright works. A promising example was an agreement between the national library and the national publishers' association in France within the context of Gallica 2. Other interesting developments exist for example in Germany and Norway. Europeana has bilateral relations with all national aggregators and many relevant ministries to secure the best possible coordination in relevant areas of activity.

Of course, the digital libraries initiative is about more than Europeana. But Europeana provides the European Union with a flagship and a practical example for the desirability of digitisation and freedom of access to information to all; a model for other nations and continents. It manages an inclusive network with representation from all countries and across all types of cultural heritage. It encourages the contribution of the

research organizations and promotes the benefits of digitization to achieve the goals set by the Commissions initiatives.

In the “Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Europeana - next steps” of August 2009 the Commission links Europeana comprehensively into its policy framework and articulates its vision for Europeana. The Europeana Foundation shares this vision and draws on this key document repeatedly in this proposal.

The major benefit of Ev2 compared to existing activities is that Ev2 extends Europeana’s activity beyond July 2011 and assures its functioning to the end of 2013. Without Ev2, operations would cease.

The Council conclusions on Europeana: next steps of the 3013th EDUCATION, YOUTH AND CULTURE Council meeting held in Brussels on 10th May 2010 continued to stress the importance of Europeana and the need to continue with existing policies.

Section B2. Impact

B2.1. Capacity to achieve expected outcomes and impact

Capacity

Ev2 has a good chance of success if it can continue to mobilize existing and new stakeholders in the years ahead. It has built Europeana so far, on the largely voluntary support of all the cultural heritage domains acting together, via the Europeana Foundation. It has enjoyed the financial and political support of the Commission and the Member States, its own staff and a wide range of sympathetic stakeholders. The Europeana Foundation is the only organization currently in a position to lead this Network. This has been further underlined by the willingness of Member States to contribute funds towards the overhead and matching funding needs of the Foundation.

Impact

The impacts required of this Network are specified in the 2010 Work Programme. They are:

- Facilitating the operation and development of Europeana for enriched content and improved functionalities,
- Improving user satisfaction,
- Better coordination and enlargement of the network of contributing organisations.

The table below provides some essential Impact Indicators and the measurement method. Base values will be included at the time the Grant Agreement is finalized. Additionally, a more full set of Impact Indicators spanning across all areas of work will be included in the annual Business and Product and Service Plans of Europeana against which reporting will be done in the European Foundation Annual and Interim reports.

As the project is foreseen to start 14 months after the submission of the proposal it is only possible to provide expected percentage growth of some of the performance indicators. Exact numbers can be provided at the negotiation stage if the proposal is successful. Some of the targets will be adjusted in the aforementioned annual business and product and service plans.

Table 1: Indicators

IMPACT INDICATORS TABLE						
Indicator No.	Relating to which project objective / expected result?	Indicator	Method of measurement	Expected Progress		
				Year 1	Year 2	Year 3
1	Users, penetration and use	Amount of time spent on the site.	Logfiles and Google Analytics	Average to be over 2 minutes	Average to be over 2.5 minutes	Average to be over 3 minutes.
2	Users, penetration and use	Number of visits	Logfiles and Google Analytics	Increase of 20% on 2010	Increase of 10% every 6 months	Increase of 10% every 6 months

3	Users, penetration and use	Number of returning visitors	Logfiles and Google Analytics	Increase of 10% every 6 months	Increase of 10% every 6 months	Increase of 10% every 6 months
4	Users, penetration and use	Percentage of inbound links (links to europeana from other sites)	Logfiles and Google Analytics	Increase of 10% every 6 months	Increase of 10% every 6 months	Increase of 10% every 6 months
5	Users, penetration and use	Single record reuse of contents taken from Europeana and used elsewhere	Trackbacks on single use	10% increase on 2010	10% increase on 2011	10% increase on 2012
6	Content Improvement	Number of broken links	Actual count	Less than 15% of total per month	Less than 10% of total per month	Less than 5% of total per month
7	Content Improvement	Geo referencing	Amount of metadata with integral Geo-referencing	10% increase on 2010	10% increase on 2011	10% increase on 2012
8	Content Improvement	Persistent Identifiers	Digitised content to make use of persistent identifiers	10% increase on 2010	10% increase on 2011	10% increase on 2012
9	Content increase	Increase in number of digital objects	Number of metadata records in Europeana	Month zero plus 5 million	Month 12 plus 5 million	Month 24 plus 5 million
10	Content reuse	Amount of content extracted for use in other sites	Trackbacks and API usage	10% increase on 2010	10% increase on 2011	10% increase on 2012

11	UGC Content	Amount of UGC content	Number of metadata records	20% increase on 2010	10% increase on 2011	10% increase on 2012
12	Sustainability, financial and coordination of contributing organisation	Attendances at Plenaries	Actual count	250	250	200 ¹
13	Sustainability, financial and coordination of contributing organisation	Number of network members	Members' list	180	180	160 ²
14	Sustainability, financial and coordination of contributing organisation	Funds raised from Ministries etc for matching overhead	Funding Report in Annual and Interim reports	500,000 euros	500,000 euros	500,000 euros
15	Technology including features and functionalities	Releases of Europeanana	Releases	See targets set in the Product & Service plan	See targets set in the Product & Service plan	See targets set in the Product & Service plan
16	Innovation and Facilitation	APIs take up by partners	Actual count	5	10	15
17	Innovation and Facilitation	Projects use of EuropeananaLabs	Numbers of projects	5	10	15
18	Innovation and Facilitation	Contributions from the Open Source community	Numbers of Contributors	3	5	6

¹ The number of participants at Europeanana plenaries might decrease over the project's duration. Should our aggregator strategy be successful, a lot of the work regarding knowledge-sharing and dissemination of Europeanana results and developments across the cultural heritage sector and the thematic network will be shared with national and other aggregators and therefore there will be more distributed opportunities for content providers to take part in the developments.

² Same as above. The number of network members might decrease as content providers join national aggregators and cross-domain.

19	Innovation and Facilitation	Number of corporate publications, including White Papers and policy documents	Number of publications	3	3	3
20	Innovation and Facilitation	Number of events at which Europeana is invited to present	Number of presentations at events	20	20	20
21	Innovation and Facilitation	Level of attendance at Europeana-branded workshops and events	Number of participants	100	100	100

CONTENT STRATEGY

Europeana will need a revised content strategy for the period in question which is expected to start in August 2011. Obviously the strategy must reflect needs **at that time**.

At the time of writing of this proposal the major content issues are as described in section B1.1. Europeana's current content strategy will be updated and targets will be set to address priorities as perceived in August 2011. Quality will be more important than quantity and much of the concentration will continue to be on the improvement of the metadata and thumbnails so that content can be more easily found and linked. Each year the Content Development Plan will be updated in line with the Content Strategy and a cohesive policy of building content for the user rather than the current strategy where users are built for the content. This will require stronger direction from Europeana from 2011, so a Director of Content will be put in place.

B2.2. Long term viability

In its reply to Questions for the public consultation "Europeana - next steps" the Europeana Foundation makes the following main points:

“In the interests of public access to Europe's cultural and scientific heritage in the long-term, and the sustainability and independence of Europeana, the funding model should be **100% financed by the European Union, including overhead costs.**”

“Countries already pay into the Community budget for the promotion of European cohesion and social unity. Some deployment of this budget to a development such as Europeana would serve well.”

On the subsidiary question “Should there be a contribution (financial or other) in exchange for the links from Europeana to sites with content for which the user has to pay?” -the Europeana Foundation has expressed the following view:

“Europeana must be operational first, and then the opportunities for this type of linkage can be explored. The model must be simple to operate and not have complex accounting requirements. The Gallica 2 model has to be studied in more detail for Europeana in order to be sure that it could be transposed to Europeana as well as other models such as the German or Norwegian models. Revenue opportunities such as affiliate income should be explored, e.g. links through to the item sold on BOL.com, Amazon, iTunes or on publishers' own sites.”

According to the “Results of the online consultation on 'Europeana - next steps'” the Europeana Foundation’s position receives considerable support as evidenced here:

“There seems to be a general acceptance that **in future** there will **also be a need for public funding for Europeana**. The overwhelming majority of respondents indicate that **relying entirely or to a large extent on private funding for the financing of Europeana** could have an **adverse effect on its objective and could compromise long-term sustainability**. Europeana should not be turned into a commercial endeavour and more in general **private funding and involvement should not jeopardise the aim of providing the widest possible access to cultural heritage**.”

In its Draft Report on "Europeana - the next steps" (2009/2158(INI)) the Committee on Culture and Education of the European Parliament opines that:

“Public funding models should include both an increased contribution by the Member States and a continuous Community contribution after 2013.”

In Europeana Next Steps the Commission says that:

“Financing in the medium term (2013 and beyond)

For the period beyond 2013 additional ways of financing Europeana should be considered, which strike the right balance between Community funding and other resources, and moving away from the present project-based financing. Complementary sources of financing could be provided through public private partnerships or through a more structural contribution by the Member States. Some site revenue can also be expected, but this will only cover a very modest share of the total costs for running the service. Making the end user pay for finding the content through Europeana and for the other functionalities of the site is not an option, since this would seriously jeopardise the take-up by the users and would run counter to the basic aim of the site.”

“Europeana Next Steps” goes on to discuss the possible contribution of public/private partnerships and also of continuing public funding for Europeana beyond 2013. It sums up the position thus:

“A Community contribution after 2013 would find its justification in the European added-value of the site and its importance for demonstrating Europe's unity in all its cultural diversity. However, the present project funding, based on open calls for proposals, is not a sustainable basis for financial planning. Alternatives for the basic funding of Europeana need to be considered within the range of available policy instruments.”

The Europeana Foundation agrees with this analysis and will continue to work with key stakeholders towards the establishment of a viable long-term funding model. This work will include the following activities.

Work on the value proposition of Europeana will continue under Ev2. This includes establishing clear and quantifiable value for each of the stakeholders and clients of Europeana. The business model divides the clients into Users, the European Union, Ministries and Governments, Sponsors and the market. Each of these is being addressed to discover what Europeana can give to them and whether such services can either earn or save money.

The process of lobbying for a more central, structural solution has begun with the recommendations in Council and Parliament. These need to be turned into structural funding under the financial perspectives of the years 2013 to 2020. Europeana will continue to work with the Commission to find viable solutions for its running cost and will hold a series of strategic briefings for the ministries of culture and education across Europe. It also actively makes use of the Funding and Orientation Group of the Member States Expert Group in this regard. The value proposition will be used to show to each group the intrinsic value of Europeana to them. The Funding Plan of WP2 will be updated yearly to attract new monies and sponsorship. A plan for the selling of relevant services will be put in place if agreement can be reached with content providers over the commercial reuse of metadata. The business plan will be produced in accordance with the wishes of the stakeholders, including the European Commission, the content providers and those of the Europeana Foundation to run a fully operational portal for end users and stakeholders alike.

B2.3. Dissemination plan and availability of common results

Dissemination of network outcomes

The Thematic Network Website of Europeana v1 www.version1.europeana.eu will be updated to become the dissemination website of Ev2. It will retain the results of Europeana v1 and build on these.

Under version 1 Europeana works very closely with the other projects of the CIP programme and also with those driven under the Infrastructure DG. The aim is to avoid reinvention of the wheel and to learn from, make use of, the activities of others. This includes the sharing of knowledge and results with networks and experts from other continents.

To this end the network currently has a newsletter with a wide range of subscribers from journalists to semantic web specialists to museum curators. There are just under 100,000 subscribers and this would be expected to continue and grow under Ev2.

More effort will be put into attracting usage to the site of Europeana.eu, (described in WP1). So no marketing or dissemination of Ev2 will take place to end users as this could lead to brand confusion and dilution of the message of Europeana as a point of access to the cultural heritage of Europe.

Therefore the dissemination of the Ev2 will be limited to the following:

- A website building upon the contents of version1.europeana.eu, to include:
 - the Description of Work
 - All public deliverables
 - Rules of the Thematic Network and joining instructions
 - List of members of the network
 - Opportunity to have an RSS feed to be alerted to new information
 - Opportunity to sign up to the newsletter
 - Promotion of the activities of the Thematic Network, such as conferences, whitepapers etc.
 - Access to the work of the Europeana Foundation
 - Link to the online collaborative workspace of Ev2
- Continuation of the group.europeana.eu website as a central access point to all the related projects of Europeana.
- Promotion of the activities of Europeana version 2.0 at conferences and seminars.

Free availability of common results

It is, and will continue to be, Europeana's policy to be transparent and share the development work carried out by Europeana with the Open Source community via platforms (EuropeanaLabs and Open Europeana) by recording, storing and sharing documentation and source code.

Europeana makes and will continue to make huge efforts to ensure free availability of its own source code, its repositories of multilingual and ontological resources and to create an environment for innovation and experimentation. Europeana has an open source development environment for partners of all relevant EU projects: EuropeanaLabs. EuropeanaLabs is hosted by CNR-ISTI, who will continue this work as a partner of Ev2. In addition a true open source development environment (Open Europeana) set up under Europeana version v1.0, will be maintained as part of the remit of Ev2. This will allow creative use of the data and the code to develop new innovative functionalities, applications and features.

WP7 task 1 will set up a group of Open Source developers committed to the development of software tools and services that are valuable to the broader cultural heritage network. They will be initially drawn from the partner EU-funded projects that have a commitment to delivering content or software to Europeana or are working in similar areas of work, and thus have an interest in joining forces in order to leverage the available resources and produce results of scale for the common benefit of the partners and projects current and future.

Europeana benefits substantially from the close collaboration with the Europeana Projects Group, the Group of currently, 16 EU-funded projects with which Europeana has established clustering activities in common areas of work such as copyright, multilinguality and communications. The Working Group on Communications, in particular, is responsible for the broad dissemination of the results achieved within the Projects Group. The combination of the projects' communication networks has a tremendous potential in reaching hundreds of European content providers, research and academic institutions, press contacts and interested end-users.

Openness of the network

The existing Europeana v1.0 network has more than 180 members. They consist of libraries, museums, archives, audio visual archives, MLA associations, university researchers and other supporters of Europeana including live projects. They sign a network agreement and participate in major consensus-building activities and in the development of new data models and technologies. Many of them also supply content. They do not have budgets or individually defined roles. Ev2 will create a similar open framework which will allow members to join the network, when it is launched, and during its period of activity. It is anticipated that existing members of Europeana V1 will transfer and new ones will join. Ev2 will openly state its membership criteria on its website. From this network, together with the Council of Content Providers and Aggregators work groups required by the work packages are formed such as Users, Legal, Aggregators, Semantic Web, Multilingualism, Data Modeling.

Section B3. Implementation

B3.1. Capability and commitment of the partnership

Partners

Partners in Ev2 have been chosen to strengthen the capabilities of the Europeana Office. This includes expertise in innovation from INA, and Beeld en Geluid as well as knowledge of multilingualism and research in the field of Digital Libraries from Humboldt University and the Österreichische Nationalbibliothek.

To make strong use of the European Union Presidencies during the project, the Irish Ministry for Sport and Culture and the National Library of Poland will help produce conferences on Europeana and issues of current importance for digital libraries. The Spanish Ministry of Culture will do the same. CNR-ISTI will continue to host the development environment of EuropeanaLabs and individuals currently working as freelancers will be employed on development work as a partner. The British Library will lead the Dissemination work in WP4 concentrating on Communications to the Thematic Partner Network and to the Press.

1. Stichting European Digital Library [Europeana Foundation]

The Stichting European Digital Library is a cross domain foundation, under Dutch law, set up for the purpose of fostering collaboration between Museums, Archives, Libraries and Audiovisual Collections in Europe. It aims to provide access to Europe's cultural heritage by facilitating formal agreement across museums, archives, audio-visual archives and libraries on how to cooperate in the delivery and sustainability of a joint portal. It also provides a legal framework for use by EU funded projects to bring their research or content into Europeana. The Stichting European Digital Library (EDL Foundation) is in the process of formally changing its name to Europeana Foundation. The Europeana Foundation governs Europeana and employs its staff, who make up the Europeana Office. The Foundation, using its Europeana Office coordinates the Europeana V1.0 network and will have the same role in Ev2. The commitment of Foundation Supervisory Board members, its Executive Group and the Europeana Office is huge. The Foundation members give all their time voluntarily and the Europeana Office carries out the work with a very committed, capable staff from 15 countries with expertises in technologies, the semantic web, multilingualism, online exhibitions, marketing, data modelling, interoperability, collaboration, fund raising, business development and project management.

The Europeana Office has more than 30 staff led by the Executive Director of the Europeana Foundation, Jill Cousins.

Key Personnel:

Jill Cousins is Executive Director of the Europeana Foundation and Director of The European Library. She created both operational services, The European Library and Europeana. She has a strong web publishing background, having worked for VNU as their European Business Development Director and then transferred the lessons learnt from commercial business-to-business publishing to scholarly publishing working for Blackwell Publishing and several other academic publishers in the UK. Prior to a publishing career, she worked in the online environment for many years, first as a researcher with her own company specialising in providing business information to large corporate companies. After selling this company Jill worked as the Marketing Director for Online information. She has been involved in several international publishing industry bodies such as CrossRef and COUNTER.

Dr Elisabeth Niggemann chairs the Europeana Foundation's Executive Committee and is Chair of CENL [Conference of European National Librarians] and Director General of the Deutsche Nationalbibliothek with locations in Leipzig, Frankfurt am Main and Berlin. From 2006-2009 she was a member of the High Level Expert Group on Digital Libraries. She is a member of the Board of Trustees of OCLC (Online Computer Library Centre), a Board member of the "Stiftung Buchkunst", a member of the Advisory Board „Bibliothek und Information“ of the Goethe-Institute, a member of the Board of Trustees of the Kulturstiftung der Länder and editor of the "Zeitschrift für Bibliothekswesen und Bibliographie." Dr Niggemann is a member of a Reflection Group on Digitisation recently established by the European Commission with the aim to support the cultural sector to make the transition towards the digital age.

Partners in Ev2

2. The British Library [BL]

The British Library is the national library of the United Kingdom. Its history dates back to the formation of Department of Printed Books of The British Museum in 1753. The British Library was formally created by the 1972 British Library Act. It is a non-departmental government body sponsored by the Department of Culture, Media and Sport. The annual report is available at <http://www.bl.uk/aboutus/annrep/index.html>

The British Library was a founder member of The European Library (TEL) www.theeuropeanlibrary.org and is an active member in the governance and running of this operational service. It was a partner in TEL-ME-MOR and lead partner in PLANETS. It is also involved in IMPACT and ARROW. It has made its bibliographical metadata available to the TELplus workpackage on multilingual access.

The Chief Executive, Dame Lynne Brindley, was a member of the High-level Group on Digital Libraries, and she chaired the expert group on public and private partnerships.

The British Library is a significant contributor of content to Europeana. It is also a member of CENL, LIBER and CERL. In Ev2 the British Library will lead WP4 concentrating on Communications to the Thematic Partner Network and to the Press.

Key Personnel:

Jon Purday is currently Senior Communications Advisor for Europeana, and has been managing the project's communications and marketing activities since 2007. He is currently on secondment from the British Library, where he was Head of Corporate Communications from 2000, implementing award-winning campaigns around public value and digital access. Previous roles include communications for the Library's digital initiatives in the 1990s and strategic marketing for the bibliographic, photographic and publishing departments.

He began his career as the first Curator of Recorded Literature at the National Sound Archive, and has also worked in events management and online communications for financial services. He read English at the University of Sussex, and did postgraduate studies in marketing at Manchester Business School. He is a Chartered Member of the Institute of Marketing, and has taught communications on their professional development programme.

3. Österreichische Nationalbibliothek [ONB]

The Austrian National Library (ONB) is the main scientific library of the Republic of Austria. With a history dating back to the 14th century, the Austrian National Library's collections contain a significant part of the world's cultural heritage. The library offers access to and professionally competent advice on its own holdings and links to international digital resources and digital library services. The Austrian National Library is required by media law to receive a copy of every publication appearing in Austria. Since 2009 the media law also includes legal deposit of online publications and the Austrian National Library has a legal mandate to harvest the Austrian web space on a regular basis. The Library also acts as a research centre and has been involved as a partner in numerous national and international digital library initiatives including several projects funded by the European Commission in FP4, FP5, FP6 and FP7, as well as in the *eContent* and *eContentplus* Programmes, recently including IMPACT, PLANETS, DELOS, BRICKS, EDLproject, EDLnet, TELplus, EuropeanaTravel and Europeana v.1.0. The library is strongly involved in the Commission's European Digital Library initiative and acts a project coordinator of the EuropeanaConnect Best Practice Network which is a core project in the actual implementation of Europeana.

The library's Research and Development Department brings many years of experience in the area of digital libraries, digital repositories, digital preservation, and in management of complex international research projects. In Ev2 the ONB leads WP7, Innovation.

Key Personnel:

Max Kaiser, M.A., Head of Research and Development, joined the Austrian National Library in 2000. Max Kaiser has many years of experience in national and international research and development projects in the field of digital libraries, digital preservation and digitisation. He has been involved in several EU projects in the Commission's FP4, FP5, FP6, FP7, *eContent* and *eContentplus* programmes including MALVINE, LEAF,

BRICKS, reUSE, DELOS, PLANETS, EDL, EDLnet, TELplus, IMPACT, Europeana v1.0 and EuropeanaTravel. He has led the Digital Preservation Testbed Subproject within PLANETS (FP6) and is acting as Subproject Lead and Executive Board member within IMPACT (FP7). He is project coordinator of the EuropeanaConnect project and member of the Network Management Board of Europeana v.1.0. He is member of ONB's Digital Library Steering Board and teaches Digital Libraries and Digital Preservation at the University of Vienna, the University Krems and the Center for Information and Communication Technology and Management in Eisenstadt.

4. Humboldt-Universität zu Berlin [HU Berlin]

The School of Library and Information Science of the Humboldt University (BSLIS/IBI) is the oldest school of library science in Germany, the only library school at a research university, and the only German institution with the right to give a doctorate in library and information science.

The BSLIS's aims are to prepare students to take information management positions within companies and public institutions. Important among the goals of BSLIS are the aims to engage internationally at both the teaching and research levels and to build a research and teaching program that creates a distinctive Humboldt perspective and a practical set of tools for addressing the changing needs of the world of information.

These points reflect the reality of academic work at the institute and at same time well illustrate BSLIS' motivation for playing an important role in a project such as Europeana 2.0. Currently the institute is involved in the Europeana v1.0 Network (with guidance in WP3 on semantic interoperability and data modelling), EuropeanaConnect (leading WP1 on creating the Europeana semantic data layer and drafting 'semantic' functionality as well as WP2 on multilingual issues), ASSETS and GALATEAS.

In Ev2 HU Berlin will be leading the task on "Semantic Web / Multilinguality" as part of WP 7.

Key Personnel:

Prof. Dr. Stefan Gradmann is Professor of Library and Information Science with a focus on knowledge management and semantics based operations. He studied Greek, philosophy and German literature in Paris and Freiburg (Brsg.) and received his Ph.D in Freiburg in 1986 in literary science. He has worked as scientific librarian at the State and University Library in Hamburg, he was the director of the GBV Library Network, and worked for Pica B.V. in Leiden as product manager and senior consultant. Later he was Deputy Director of the University of Hamburg Regional Computing Center and has been directing several projects funded by the German Research Association and the EC. Stefan was an international advisor for the ACLS Commission on Cyberinfrastructure for the Humanities and Social Sciences, and as such has contributed to the report "Our Cultural Commonwealth" ([http://www.acls.org/cyber infrastructure/OurCulturalCommonwealth.pdf](http://www.acls.org/cyber%20infrastructure/OurCulturalCommonwealth.pdf))

He is currently heavily involved in building Europeana, the European Digital Library, and more specifically was leading WP2 on technical and semantic interoperability as part of the EDL.net project as well as currently co-leader of the corresponding WP3 as part of Europeana v1.0 and leader of EuropeanaConnect WP1 (Semantic Data Layer). He is furthermore involved in the Europeana related projects ASSETS, EFG and GALATEAS.

He is President of the German Society of Information Science and Information Practice (DGI).

Prof. Dr. Vivien Petras holds a MA in Library and Information Science & Business Administration from Humboldt University, Berlin, Germany, and a Ph.D. in Information Management & Systems from UC Berkeley, USA. She worked as the Deputy Head of the Information Science R&D department at the Social Science Information Centre in Bonn, now GESIS –Leibniz Institute for the Social Sciences, where she coordinated several projects concerned with semantic interoperability, information retrieval and open access. She now works at the Berlin School of Library and Information Science and leads work package 2 (Multilingual Access to Content) in the eContentplus EuropeanaConnect project and is a member of the core expert group for the eContentplus project Europeana v1.0.

Steffen Hennicke is a research assistant at the Berlin School of Library and Information Science. He studied history, political science, and media science at the University of Potsdam, Sussex University (UK), and the Free University of Berlin and received his Magister Artium (MA) in 2007. He has worked in a software company on data conversion for archives and museums.

Currently he is involved in EuropeanaConnect WP1 “Creating the Europeana Semantic Layer” and working on a Ph.D project about the application of heuristics based on advanced semantic networked methods in historical research.

5. Ministerio de Cultura [MCU]

The Ministry of Culture (Spain) through its Directorate General for Books, Archives and Libraries is carrying out a number of important digitization projects and one of its targets is to involve Spanish cultural institutions in Europeana. MCU is already a partner of Europeana Local as national co-ordinator. Hispana, the directory and harvester of Spanish digital resources <http://hispana.mcu.es> provides access to 453 digitisation projects and more than 1.350.000 digital resources all over Spain and aggregates local and regional databases contributing to Europeana. Other relevant initiatives include, for example, the development of the Spanish Bibliographic Heritage Union Catalogue <http://ccpb.mcu.es>, the project started in 1987 with the aim to describe and locate all library holdings and collections belonging to public and private Spanish libraries which are part of the Spanish bibliographic heritage. The development of the catalogue led to further work on digitisation of the Spanish bibliographic heritage. At the moment, nearly 5.000.000 pages of historical newspapers <http://prensahistorica.mcu.es> and 2.500.000 of important collections of medieval manuscripts, incunabula, rare books, old prints, cartographic material and photographs have been digitised <http://bvpb.mcu.es>. In Ev2 the Ministry will organise a Europeana-branded conference on digitisation and access to cultural heritage in Spain in WP4.

Key Personnel:

Susana Alegre Landaburu is the Head of International Cooperation in the Subdirector General for Libraries Coordination, at the Ministry of Culture of Spain. She is the Ministry's representative at the Council of Library Cooperation Working Group for Multiculturalism and Accessibility in Libraries. She is also the Secretary of the IFLA Library Services to Multicultural Populations Standing Committee. In 2005 she became a member of the Facultative Corps of Librarians of the Spanish State. Before that she had worked at the Cataloguing Department of the National Library of Spain, and she has also been the Director of the Library of the National Museum of Theatre in Almagro. Until November 2006, prior to her current position she was the Head of Libraries Projects and Studies at the Ministry of Culture.

6. Biblioteka Narodowa [NLP]

The National Library of Poland/Biblioteka Narodowa acts as the central library of the state and one of the most important cultural institutions in Poland. The National Library is also a national bibliographic agency, a large research library focusing on the humanities, the centre for standardization in the field of librarianship and bibliography, cooperating with the Polish Standardization Committee and the ISO, the institution that documents and disseminates information on the domestic and foreign literature holdings of Polish libraries as well as information about libraries, reference centres, and publishers in Poland and the state-of-the-art centre for the preservation and conservation of library collections. The National Library holdings as of the end of 2007 (including duplicates) totaled over 8.400.000 registered items. In October 2006 the National Digital Library Polona was launched. It provides access to the digitalized format of the National Library's most important editions of literary and scientific texts, historical documents, periodicals, fine prints, photographs, printed and sheet music and maps. The National Library is a partner of the European Library since January 2007 and EDLnet-Thematic Networks. Since September 2007 it is a member of TELplus project. The National Library is financed by the Ministry of Culture. In Ev2 the Library will organise a Europeana-branded conference on digitisation and access to cultural heritage in Poland in the framework of Poland's EU presidency in 2011.

Key Personnel:

Katarzyna Ślaska holds Master's degree in library and information sciences at the University of Warsaw. From 1988 on she worked in the Early Printed Books Department in the National Library of Poland. From 2000 to 2006 she was a head of the library in the Institute of English Studies in the University of Warsaw. In 2006 she became digital librarian in the National Library of Poland, and in August 2007 director for development in this library. She is currently responsible for the digitisation in the National Library of Poland and in charge of

several projects concerning digitisation and OCRing (TELplus project, Electronic Archive of Polish Historical Documents, Polish Literary Canon).

Agnieszka Leszyńska received Master's degree in history of art from the Adam Mickiewicz University in Poznań and graduated from Human Resources Management from the Banking School in Poznań. From 2003 she has worked in the Historical Collections Department of the National Library of Poland where she was responsible for research on Polish historical collections, preparing exhibitions and publications. In 2006 she started her work in the National Digital Library Polona with the responsibility for coordination TELplus and then Europeana Travel project as well as for preparing trainings for digital librarians. In 2010 she has moved to Secretariat for Research.

7. Stichting Nederlands Instituut voor Beeld en Geluid [Beeld en Geluid]

The Netherlands Institute for Sound and Vision (Stichting Nederlands Instituut voor Beeld en Geluid - NISV) maintains and provides access to 70 per cent of the Dutch audio-visual heritage, comprising approximately 700,000 hours of television, radio, music and film, making NISV one of the largest audiovisual archives in Europe. NISV is the business archive of the national broadcasting corporations as well as a cultural heritage institute aiming to reach out to a wide user audience. NISV has brought thousands of hours of archive footage on-line for educational use and also operates a facility for the general public, the Media Experience, that welcomes 200,000 visitors annually. In 2007, the seven-year Images for the Future programme was launched. The project, funded with a budget of €154 million from the FES Fund, conserve and digitise 17,500 hours of film, 124,000 hours of audio, 137,000 hours of video and 1.2 million photos. NISV has a strong R&D department that is doing projects on archive disclosure and access related themes such as technology aided manual annotation (enhance manual annotation process by e.g., automatic thesaurus terms suggestion, contextualisation), automatic annotation strategies (speech analysis, visual analysis), internet archiving (for contextualisation, AV web archiving), Open Access, user requirements, and visualization/interaction (narratives, storytelling, mobile, etc.).

Beeld en Geluid has been involved in EU research projects for over ten years. Recent projects include PrestoPRIME (FP7), CoSyne (FP7) LiWA (FP7), Vidi-Video (FP6), EUScreen (eContentplus), COMMUNIA (eContentplus), ECLAP (ICT-PSP). NISV is an experienced partner in National and European research projects and active in the following international organisations: FIAT/IFTA, EBU and UNESCO.

In Ev2 the Institute will lead the Task Innovative Applications, as part of WP7.

Key Personnel:

Drs. Johan Oomen is head of NISV's R&D Department and researcher at the VU University Amsterdam. He is mainly working funded research projects that focus on providing access to digital heritage over networks. These projects are executed within the scope of Images for the Future or EU programmes. Oomen is Technical coordinator of EUScreen and member of the Europeana V1 working group 1.1 Users. Oomen holds a BA in Information Science and an MA in Media Studies. He is member of the Webstream expert group (on the use of streaming media in higher education) funded by the SURF Foundation and General Secretary of the international DIVERSE network. He has worked for the British Universities Film and Video Council (London) and the RTL Nederland (Hilversum). He has given (invited) talks at leading conferences and published numerous articles in journals and conference proceedings.

Dr. Roeland Ordeman is project manager R&D at NISV and researcher Speech & Language Technology and Multimedia Retrieval at the University of Twente. He is co-founder of XMI (Cross Media Interaction), a company that provides services for automatic, speech-based annotation of audio data. He received his PhD on "Dutch Speech Recognition in Multimedia Information Retrieval" from the University of Twente in 2004. He has been working on a number of national and international projects in the area of multimedia retrieval and speech and language technology, such as LiWA, MESH, MediaCampaign, MultimediaN and the CATCH project CHoral.

8. Institut National de l'Audiovisuel [INA]

INA, a public-owned industrial and commercial company, is involved in most aspects of the audiovisual industry; audio and video archiving, restoration and commercialisation; legal deposit of French audiovisual radio and television broadcastings; professional training; technical and socio-economic research; production

research. INA is in charge of French Audiovisual Archives and a partner of the Radio and Television Broadcasters in France. About 950 staff work in the institution, in charge of Radio and TV Archives, professional training, research and experimental production, since 1975. INA collections include 900 000 hours of radio since 1930 and 550 000 hours of television since 1949. 650 000 hours have been preserved and digitised and are accessible online to professionals through the service: inamediapro. 30 000 hours representing 120 000 documents are accessible online for users worldwide on www.ina.fr

INA has been involved in several IST projects (AURORA, BRAVA, ECHO, PRESTO, CASPAR, LOGOS, MESH, VITALAS) as well as other EU projects (EURODELPHES, CAPMED), and has lead BRAVA, EURODELPHES, CAPMED and PrestoSpace successfully. INA is coordinating the current PrestoPRIME integrated project

INA's Research Laboratory conducts projects on communication tools for network applications, automated film and video restoration system, computer graphics, fingerprint technologies. The Research Laboratory has been involved for three years in audiovisual analysis and in semi-automatic and manual indexing of the programs as in metadata management systems. INA is a strong actor in the training and the educational domain. With 240 training courses per year and 5000 students, it is one most important centre in France for professional training in the audiovisual domain, covering all the fields, from production to preservation. Academic courses are developed since 2000, in relation to prestigious universities as the Sorbonne, Paristech, and Paris Est Marne la Vallée.

INA is also involved in FIAT (International Federation of Television Archives) since its origin and in the Europeana project where INA is a member of the Europeana Foundation. In Ev2 INA will undertake Market Revenue Research in WP3.

Key Personnel:

Daniel Teruggi studied composition and piano in Argentina. In 1977 he came to France and studied at the Paris Conservatory (Conservatoire National Supérieur de Musique de Paris) in the department of Electroacoustic Composition and Musical Research. In 1981, he became member of the INA-GRM where he first was in charge of the pedagogy of digital systems for composers, and then became Artistic Director of the group. In 1997 he became Director of the INA Groupe de Recherches Musicales. Since October 2001 he directs the Research and Experimentation Department in INA. PhD in Art and Technology in the Paris VIII University. He teaches Sound and Visual Arts, at the Paris I Sorbonne University.

Philippe Poncin graduated from École Nationale des Télécommunications in June 1973. After joining the Archives Management of INA in 1977, he designed and set up the technical division, including all the storage, inventory and restoration services with dedicated buildings, equipment and technical staff trained for the purpose. He was then Deputy Director since 1984. He was also responsible for surveys and reports in France and abroad as technical chairman of the FIAT (International Federation of Television Archives) from 1984 to 1994, organizing Joint Technical Symposia with IASA and FIAF. He was involved as manager of INA's mission in China from 1995 to 1997. He joined the Audio-visual Research Laboratory of INA in 1997, in charge of management of the European research projects as Deputy Director of research.

Roei Amit, Head of Publishing, on line & off line at INA ;

PhD in social science and political philosophy of the Ecole des Hautes Etudes en Sciences Sociales, Paris.

9. Consiglio Nazionale delle Ricerche [CNR-ISTI]

Consiglio Nazionale delle Ricerche (CNR) is the Italian national public body chartered to conduct, promote, disseminate, transfer and catalyze research activity in the most important areas of knowledge development and application for the scientific, technological, economic and social development of the Italian country. In ARMONICA, two CNR Institute will be involved, the Istituto di Scienza e Tecnologie dell'Informazione (CNR-ISTI) and the Institute of Cognitive Sciences and Technologies (CNR-ISTC).

The CNR-ISTI, which is organised in 16 laboratories, is committed to producing scientific excellence and playing an active role in technology transfer. The team participating in this project belongs to the 'Multimedia Networked Information System Laboratory', which consists of 48 researchers and technicians conducting research and development activities on algorithms, techniques and methods for information modelling, access and handling, as well as new architectures and system services supporting large networked multimedia information systems. The CNR-ISTI team has been involved in many EU-funded projects relevant to the topics addressed in this project, namely in the following FP6 projects: DILIGENT, MultiMatch, BRICKS, BELIEF,

CASPAR, DRIVER, SAPIR. It is currently involved in the 7th FP projects: EFG, DRIVER II, D4Science, TrebleClef and BELIEF II, DL.org. The CNR-ISTI team is also involved in the development of the Europeana Digital Library, by participating in the project Europeana V1.0, with a leader role in the definition of the Europeana data model and functional specification. The CNR-ISTI team has been the Co-ordinator of the DELOS II Network of Excellence in Digital Libraries. In Ev2 CNR-ISTI will be responsible for the hosting and maintenance of EuropeanaLabs.

Key Personnel:

Carlo Meghini is a prime researcher at ISTI. In more than two decades of work, he has published more than 50 papers in international conferences and journals in the area of information systems. He has contributed the Multimedia Information Retrieval Model entry to the Encyclopedia of Database Systems. In the last years, he focused on Digital Libraries, publishing both on practical and theoretical aspects of Information Access. He has been a task leader in the DELOS Network of Excellence in Digital Libraries, a contributor to the DELOS Reference Model, deputy director of the foundations of the BRICKS Project (FP6 IP), Stream Director in the CASPAR Project (FP6 IP) on digital preservation, and is currently co-leader of the technical Work Package of Europeanav1.0 Thematic Network aimed at creating the European Digital Library.

Cesare Concordia is a full-time researcher at the ISTI-CNR institute where he have been working since 1999 in the fields of networked information systems and digital libraries, and where he is a member of the Networked Multimedia Information Systems (NMIS) Laboratory. His research interests include: semi-structured databases, Service Oriented Architectures (SOA), semantic web frameworks.

In the last years, he has been involved in a number of projects in the area of distributed information systems, object oriented applications and digital libraries. He has been a member of the "Core-Development Team" of the BRICKS project, member of the development team in the Thematic Network Partner Group ³EDLNet² and he is currently technical responsible of the "Europeana Labs", the development and testing infrastructure of the Europeana version 1.0 project.

10. Department of Tourism, Culture and Sport [DeptTCS]

The Department was formed in June 2002 and its mission is to support tourism industry and increase access to, and participation in sport, the arts and culture. There are about 120 staff working in the main Department between its offices in Dublin and Killarney Co. Kerry. There are a further 50 people working in the National Archives which is currently part of the Department. Being responsible for arts and culture policies the Department supervises the following institutions: The Arts Council, the Irish Film Board, Culture Ireland, the National Gallery of Ireland, the National Library of Ireland, the National Museum of Ireland, the Chester Beatty Library, the Irish Museum of Modern Art (IMMA), the National Concert Hall, the Crawford Art Gallery and the Irish Manuscripts Commission among others. The Department promotes digitisation in the sphere of culture and committed to support Ireland's profile in Europeana and in European v2.0 will be organising an international conference on digital cultural assets to coincide with Ireland's EU Presidency in 2013.

Key Personnel:

Chris Flynn is a Principal Officer over the Information Technology Unit and also the Arts & Cultural Institutions Unit (Dublin). He has been involved in a number of IST initiatives implemented by cultural institutions functioning under the auspices of the Department. In the project he will be supported by his colleagues from Arts & Cultural Institutions Unit (Killarney) and **Dr. Cathy Hayes** of the Irish Manuscripts Commission.

Other members of European v2.0

The existing Europeana V1.0 network has more than 180 members. They consist of libraries, museums, archives, audio visual archives, MLA associations and other supporters of Europeana. They sign a network agreement and participate in major consensus-building activities. Many of them also supply content. They do not have budgets or individually defined roles. Ev2 will create a similar open framework allowing new members to join the network when it is launched and during its period of activity. It is anticipated that 95% of existing members of Europeana V1.0 will transfer. The aim to work at consolidating the playing field into aggregators of content, so it is possible that the network will reduce in size over the 29 months of the project.

B3.2a. Chosen approach

Strategy of Europeana v2.0

According to the Europeana Consultation:

“The financing model agreed should not impose problems that make it difficult for Europeana to compete with the private sector. For example, project funding imposes a huge administrative burden on the Europeana office, reduces flexibility and distorts strategic planning. Ultimately, this reduces the return seen for the citizen in the product and service delivered.”

July 2010 sees the operational release of Europeana.eu. A full development of the prototype launched in 2008. A complete metadata ingestion process will be in place and all the code written to production standards. During the same period the organization running Europeana has grown from 7 people to 30, with 6 freelancers. The organization has been shaped to run a business and struggles to marry the needs of the business with project based funding and project management. Six members of the Europeana Office team are dedicated to external projects, which are distracting and represent only very small contributions to the work the office needs to undertake.

In line with the approach suggested by the EDLF consultation, Europeana seeks to minimize the administrative burden of these projects while gaining the best out of them. To this end the Europeana Office is operating a programme management approach and is looking for most content-based projects, to be dealt with via subcontracting. This approach will continue under Ev2, with programme management of all Europeana related projects within the Europeana business unit structure. The Business Units and overall organizational structure are reflected in the organogram below. The aim of the organisational structure and the work plan outlined below is to continue to deliver the Europeana.eu service both as a flagship portal and as facilitator for a more distributed model of access across Europe via its APIs. The Work Packages and the organisation have been set up to achieve this.

Europeana Organisation

The Europeana Office is the operational arm of the Europeana Foundation. The Europeana Foundation is representative of cultural heritage content holders across Europe.

The Europeana Foundation is managed by an appointed Executive Group of individuals from the Associations who hold the decision making and financial responsibility for the Foundation and thus Europeana. Two other layers exist in the Foundation:

The Europeana Foundation employs an Executive Director, who is responsible for the development and management of the Europeana Office and the creation and delivery of Europeana.eu.

The Europeana Office has a management team of 4 people: An Executive Director, a Financial Controller (.4FTE), a Business Development Director and a Technical & Operations Director. The Business Development Director is responsible for:

- Business Development (funding and sustainability)
- Marketing (end users, social networks)
- Communications (network partners)
- Projects (16 Europeana v1.0, EuropeanaConnect, EuropeanaLocal, Athena, Apenet, Carare, Hope, Assets, Judaica, Mimo, EuropeanaTravel, EFG, Prestoprime, EUScreen, BHL Europe, Regia).

The Technical and Operations Director is responsible for:

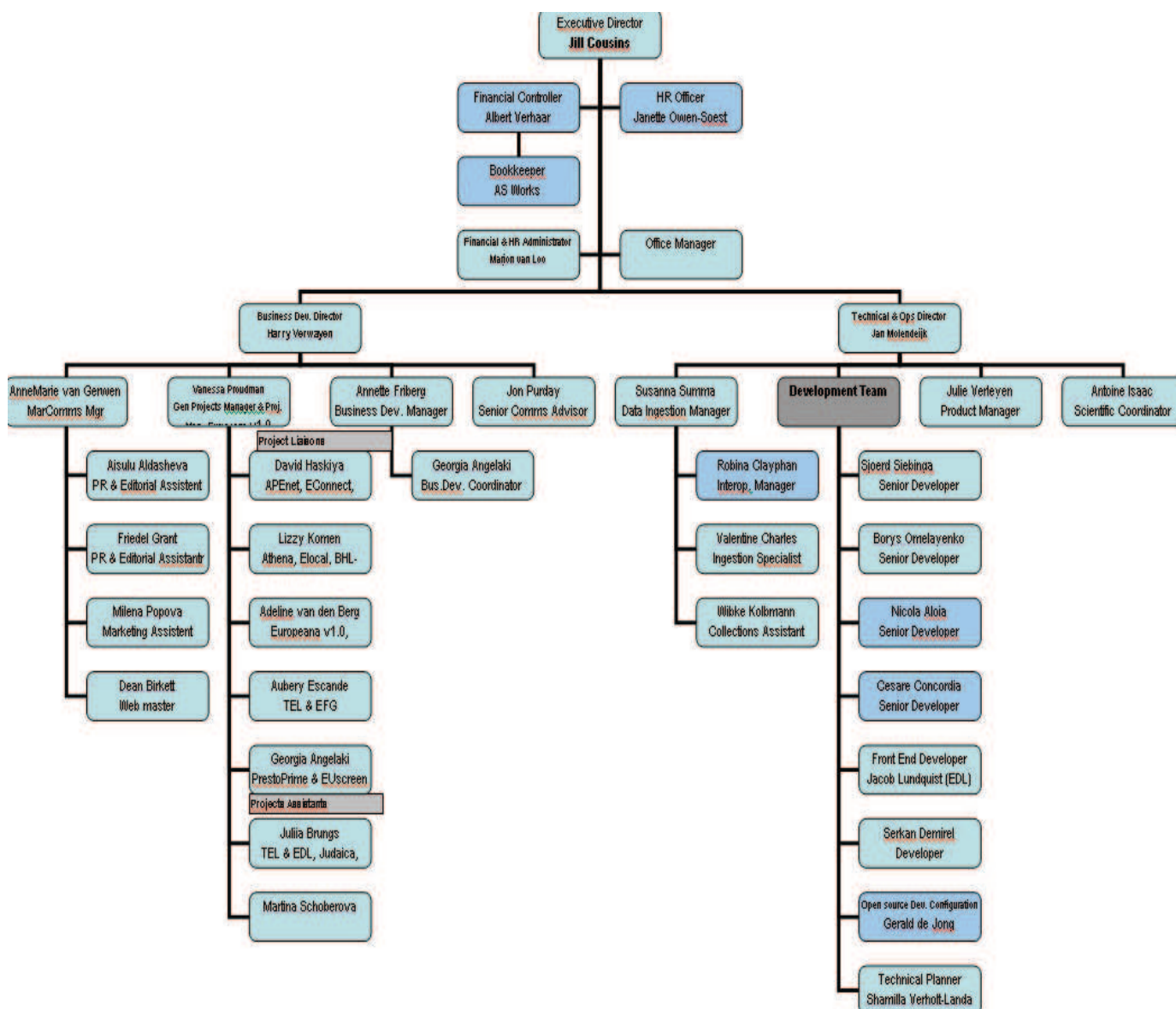
- Technical Product Management
- Development of the Service
- Open Source environment
- Development and Production Environments

- Ingestion, management and quality control of the metadata
- Interoperability
- Research and development from the projects into the business and from within business such as Multilingualism, Semantic web, new Data model.

The Financial Controller is responsible for:

- Financial control and management of all Europeana Foundation projects and sponsorships
- Correct time and financial reporting
- Audit
- Budget, Profit and Loss and Annual Reporting to the Europeana Foundation.

The organogram below depicts the Europeana Office current structure (May 2010):



Structure of Work plan and Relationship to the Organisation to Ev2

(light blue are contractors or freelancers)

The organisation of the Europeana Office is reflected in the conception of Ev2. Each work package, except WP7, Innovation, reflects a business unit. The aim is to minimize the overhead spent in project management and ensure that the time spent on developing the portal according to user and market need is maximized.

Work package 1, **User Development** is run by the MarComms [marketing and communications] team

Work package 2, **Partner and Content Development** is run by the Aggregation unit of the Business Development team

Work package 3, **Policy, Strategy and Service** is run by the Business Development Team

Work package 4, **Corporate Communications** is overseen by the Corporate Communications team and led by the BL.

Work package 5, **Operations** is run by the Data Ingestion Team

Work package 6 on **Technology** is run by the Development Team

Work package 7, **Innovation**, is externally led by the ONB to gain wider knowledge and creativity in research and innovation.

Work package 8, **Management & Finance**, is run by the Programme Management of Europeana.

All Europeana Office teams make use of the Thematic Network Members' expertise across Museums, Libraries, Archives, Audio Visual collections, research organizations and technology institutes.

Thematic Network

Ev2 builds on the thematic network of 180 partners, created under Europeana v1. The network provides:

- the content accessed by Europeana
- the working groups and
- creates a collaborative environment for the Europeana related projects.

Each **content provider** or Aggregator is a member of the Thematic Network. They sign an agreement to be part of the network and deliver their content. Additionally they sign a Data Provider or Aggregator Agreement, as best practice, to have a say in how Europeana uses their metadata.

Experience from Europeana v1.0 has shown that working groups are the lifeblood of Europeana working at a European level developing ideas for the service, creating policies and validating the work of Europeana. The **working groups** from Europeana v1.0 will be reevaluated as well as lessons learnt from working with them. The project working groups will be set up according to need under Ev2. They help create distributed, European buy-in, to new ways of working and new ideas such as the Public Domain Charter launched under Europeana v1.0.

Projects funded by the EU enable large amounts of content provision to Europeana, create Aggregation, improve data, solve language issues and develop new technologies. All projects are encouraged to be part of the Thematic Network to benefit from knowledge- sharing and shared development of the vision of Europeana. Most projects participate in working groups increasing the speed and volume of results and promoting knowledge transfer.

B3.2b. Work plan

No	WP/Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
1	User Development																													
1.1	User and market insights			M1.1 M1.7			M1.2							M1.4					M1.3							M1.5				M1.6
1.2	User marketing and communications strategy							M1.8 M1.10												M1.9 M1.11										
1.3	Define end user requirements for Europeana.eu												D1.1																	
1.4	Increase the usage of Europeana.eu portal												M1.12												M1.13					
1.5	To increase the usage of Europeana content				M1.14								M1.15												M1.16					
2	Partner and Content Dev-t																													
2.1	Partner Strategy and Plans																													
2.1.1	Analysis and Grouping of Stakeholders		M2.1																											
2.1.2	Partner Strategy & Development Plan				D2.1											D2.2														
2.1.3	Network Knowledge Transfer																													
2.1.4	Aggregation, distribution, facilitation			M2.2											M2.3												M2.4			
2.2	Content Development Plan							M2.5												M2.6										
2.3	Funding and Sponsoring																													
2.3.1	3 year Funding and Sponsoring Plan				M2.7				M2.8				M2.9							M2.10					M2.11					D2.3
2.3.2	Partnership funding and sponsoring							M2.12																						
3	Policy, Strategy and Service																													
3.1	Strategy and Organization																													
3.1.1	Annual Business Plan				D3.1										D3.2												D3.3			
3.1.2	Product and Service Plan					D3.4											D3.5												D3.6	
3.1.3	Content Strategy						D3.7												D3.8											
3.2	Policy Development																													
3.3	Product Development						M3.1						M3.2						M3.3						M3.4					
3.3.1	New product opportunities																													
3.3.2	User requirements																													
3.4	Market Revenue Research												M3.5												M3.6					
3.4.1	Implement revenue generation opportunities														M3.7											M3.8				

No	WP/Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	
4 Corporate Communications																															
4.1	Corporate communications		M4.1			M4.2		D4.1														D4.2				M4.3					
4.2	Events			M4.4												M4.5													M4.6		
4.3	Uptake of Europeana activities																														
4.4	Working with the Europeana Projects Group																														
5 Operations																															
5.1	Ingestion operations								M5.1 M5.2													M5.3									
5.2	Quality assurance of repository						M5.3		D5.1				M5.4						M5.5		D5.2					M5.6					
5.3	Support for providers and aggregators																													D5.3	
5.4	Operational data model																													D5.4	
6 Technology																															
6.1	Hosting of Repository & Portal																														
6.2	Development & Open Source environments																														
6.3	Maintenance of software and procedures																														
6.4	Dev-t and integration of new functionality				M6.1											M6.2													M6.3		
6.5	Release management and deployment						M6.4						D6.1					M6.5							D6.2						
6.6	Test & Acceptance management																														

No	WP/Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
7 Innovation																														
7.1	Developers Network and FLOSS Inventory																													
7.1.1	R&D Community					D7.1																								
7.1.2	Inventory of existing applications						D7.2												D7.3											D7.4
7.2	Development of innovative applications																		D7.5											D7.6
7.3	Semantic Web / Linked Data																													
7.3.1	Tools for semantic extraction							D7.7																						
7.3.2	Social Semantic Web																		D7.8											
7.3.3	Model refinements for EDM																													D7.9
7.4	Multilingual Access / Translation																													
7.4.1	Novel user interaction models																													
7.4.2	User-assisted translation															D7.10														
7.4.3	Leveraging user-driven & multilingual semantic data																											D7.11		
7.5	Workpackage co-ordination																													
7.5.1	Monitoring and QA																													
7.5.2	Liason with WP7 task leads and Europeana teams																													
7.5.3	Reporting and contributing to dissemination strategy																													
8 Management and Finance																														
8.1	Programme management	M8.1	M8.2	M8.3	M8.4	M8.5	M8.6	M8.7	M8.8	M8.9	M8.10	M8.11	M8.12	M8.13	M8.14	M8.15	M8.16	M8.17	M8.18	M8.19	M8.20	M8.21	M8.22	M8.23	M8.24	M8.25	M8.26	M8.27	M8.28	M8.29
8.1.1	Project Management of Ev2																													
8.1.2	Oversight of Ev2 subcontracts																													
8.2	Reporting						M8.32		D8.1				M8.30 M8.33						M8.34	D8.2				M8.31	M8.35					D8.3 D8.4
8.3	Programme and project Management Tools	M8.36																												
8.4	Quality assurance and risk management																													

Table 2: Work package list

Work package No.(i)	Work Package Title	Lead Participant No. (ii)	Lead Participant Short name (iii)	Total person months per WP (iv)	Start Month (v)	End Month (vi)
WP 1	User Development	1	Europeana Foundation	108,1	1	29
WP 2	Partner and Content Development	1	Europeana Foundation	120	1	29
WP 3	Policy, Strategy and Service	1	Europeana Foundation	92,1	1	29
WP 4	Corporate Communications	1	British Library	121,2	1	29
WP5	Operations	1	Europeana Foundation	146,8	1	29
WP6	Technology	1	Europeana Foundation	229,1	1	29
WP7	Innovation	3	ONB	65,5	1	29
WP8	Management and Finance	1	Europeana Foundation	67,6	1	29
			Total	950,4		

Table 3: Deliverables list

Deliverable No (i)	Deliverable name	WP No.	Nature (ii)	Dissemination level (iii)	Delivery date (proj. month) (iv)
D1.1	D1.1 Usability report, PM12	WP1	R	PU	PM12
D2.1	Partner Strategy & Development Plan	WP2	R	PU	PM4
D2.2	Partner Strategy & Development Plan	WP2	R	PU	PM16
D2.3	Funding Report	WP2	R	PU	PM29
D3.1	Business Plan 2012-2015	WP3	R	PU	PM4
D3.2	Business Plan 2013-2015	WP3	R	PU	PM15
D3.3	Business Plan 2014-2015	WP3	R	PU	PM27
D3.4	Product and Service Plan and Workplan 2011	WP3	R	PU	PM5

D3.5	Product and Service Plan and Workplan 2012	WP3	R	PU	PM17
D3.6	Product and Service Plan and Workplan 2013	WP3	R	PU	PM29
D3.7	Content Strategy	WP3	R	PU	PM6
D3.8	Content Strategy	WP3	R	PU	PM18
D4.1	Corporate communications plan PM7	WP4	R	PU	PM7
D4.2	Corporate communications plan PM21	WP4	R	PU	PM21
D5.1	Content quality specifications	WP5	R	PU	PM8
D5.2	Content quality specifications, M20	WP5	R	PU	PM20
D5.3	Up-to-date guidelines, M29	WP5	R	PU	PM29
D5.4	Further development of the Europeana Data Model	WP5	R	PU	PM29
D6.1	Europeana.eu release report	WP6	R	PU	PM12
D6.2	Europeana.eu release report	WP6	R	PU	PM24
D7.1	The Europeana Software Developers Network Mission Statement	WP7	R	PU	PM5
D7.2	Core Inventory of FLOSS in the Cultural Heritage Domain, first iteration	WP7	O	PU	PM6
D7.3	Core Inventory of FLOSS in the Cultural Heritage Domain, second iteration	WP7	O	PU	PM18
D7.4	Report of Inventory of FLOSS Documentation and Sustainability	WP7	R	PU	PM29
D7.5	Report on innovative applications, first iteration	WP7	R	PU	PM18
D7.6	Report on innovative applications, second iteration	WP7	R	PU	PM29
D7.7	Market study on technical options for semantic feature extraction	WP7	R	PU	PM7
D7.8	Functional specifications for social semantic functions and prototype code	WP7	R	PU	PM18
D7.9	Synthesizing report on EDM application profiles and their links to the core EDM (final version)	WP7	R	PU	PM29
D7.10	Report on User-assisted Translation Features (M15)	WP7	R	PU	PM15
D7.11	Report on Multilingual Object Enhancement (M27)	WP7	R	PU	PM27
D8.1	Europeana Foundation Annual Report 2011	WP8	R	PU	PM8
D8.2	Europeana Foundation Annual Report 2012	WP8	R	PU	PM19
D8.3	Final Report	WP8	R	CO	PM29
D8.4	Final financial statement	WP8	R	CO	PM29

Overall summary of the workplan

There are 10 project partners in Ev2 as described elsewhere. The Europeana Foundation is the project coordinator and ensures that the overall management and completion of tasks complies with the current Description of Work. Other than Work Package 4 and 7, Work Package leaders are managers and directors of the relevant business units within the Europeana Office. This helps guarantee that project work is aligned with the business goals of Europeana. WP4 on Corporate Communications is led by an expert consultant appointed by the British Library on behalf of Europeana. The WP4 leader is already successfully carrying out the equivalent WP in v1.0. WP7 on Innovation is also led by an external leader with an impressive track record. Overall organisation is based on the Prince II methodology and guidelines.

Work Package structure and their interconnections:

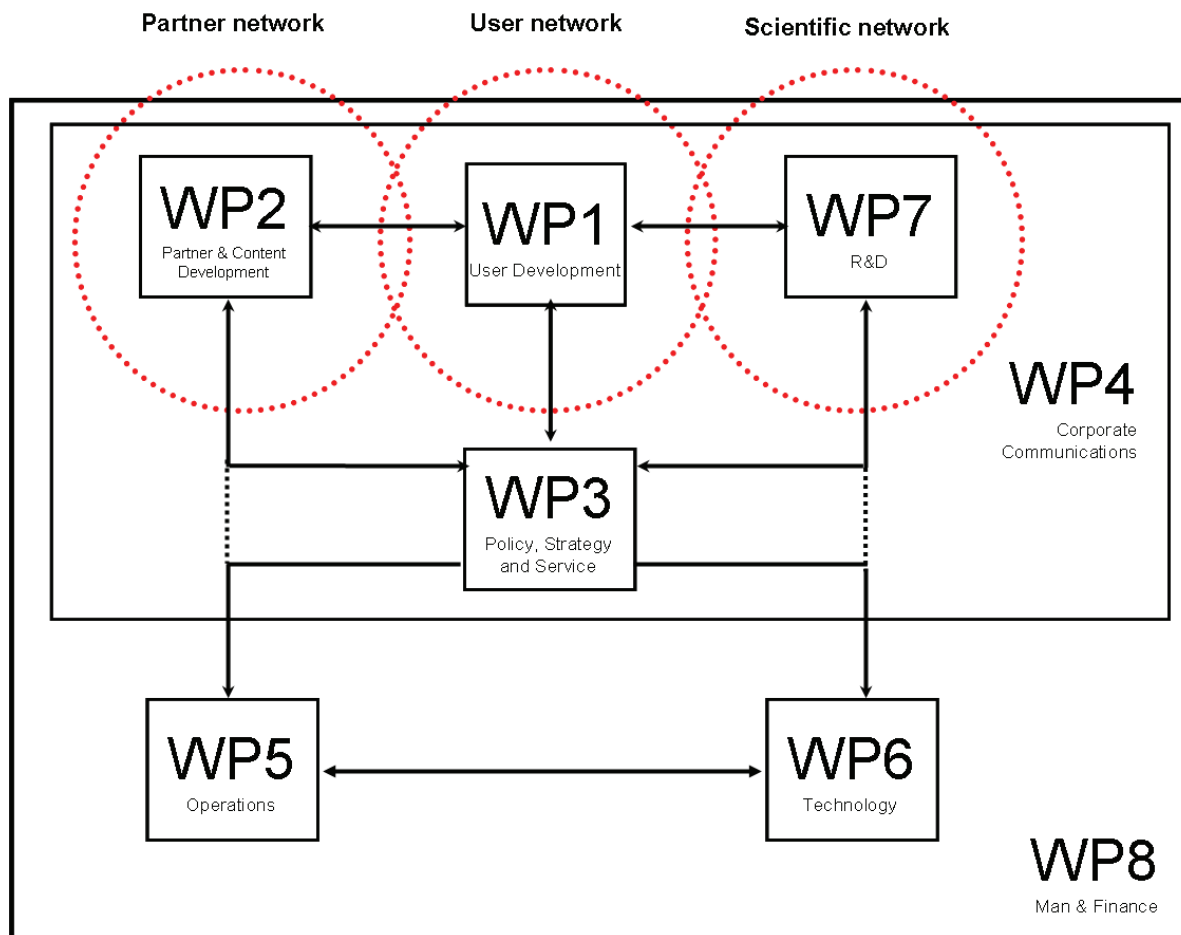
There are four “customer”-facing WPs: WP1; WP2; WP4 and WP7 that address the different stakeholder networks of Europeana:

WP1 is responsible for the development of the end-user and online communities network, **WP2** for the cultural heritage content providing organizations (content providers and aggregators), for technology and commercial partners and for the Commission and Member States political stakeholders, that is, all the parties involved with content and funding. The networks of **WP2** and **WP7** are largely derived from thematic network partners who provide the experts for the working groups that will be formed for the tasks of Ev2. **WP7** targets the network of researchers, academics and open source developers that are involved in research, development and innovation. These are the networks of stakeholders that Europeana needs to engage, cater for and leverage their potential to improve and expand her content, reach a wider end-user base, establish herself as an innovator and facilitator and secure long-term sustainability and political buy-in. **WP4** is responsible for knowledge sharing between the different user and partner networks including the Europeana Projects Group (EU-funded partner projects) via the organisation of conferences and workshops, development of the appropriate online communication tools, dissemination of the outcomes of Ev2 and the Projects Group and collaboration with **WP3** with regards to development and promotion of policy documents.

The pivotal WP of Ev2 is WP3:

WP3 plays a central role in the project, as do its activities in the operational business of the Europeana Office. It is the link between the “customer”-facing work packages and the back-end “operational” work packages (**WP5** Operations and **WP6** Technology). WP3 is the owner of product development for Europeana. It is responsible for writing the Europeana multiannual business plan. Here the goals and priorities for all WPs are set. In turn, the business plan lays down the basis for the annual Product and Service Plan and Workplan. These detail the priorities and activities for each unit and thus each work package. The number releases and their features will be included in the annual Product and Service Plans. WP3 is also responsible for developing forward looking policies to ensure the wider use of cultural heritage material by the Europeana service as well as external services in the network. WP3 has a triple role of assessing input coming from WP1, WP2 and WP3 for the development of services and tools, validating the requirements from WP5 and WP6 and creating value for the broader cultural heritage community.

WP5 and WP6 are the back-office work packages responsible for the bulk of the operations with regards to content ingestion and management and software development and releases planning and management. Decisions here again are dictated by the annual Product and Service plan with input from WP1, WP2 and WP7.

**Table 4: Work package description**

Work package number :	1	Start date or starting event:					Month 1
Work package title:	User Development						
Participant number:	1						
Participant short name	Europeana Foundation						
Person-months per participant: (i)	108,1						

Objectives (ii)

This work package increases the usage of the Europeana.eu.

Following the release of the operational Europeana.eu portal in the summer of 2010 a robust and scalable search infrastructure is in place for visitors from all over the world to explore the richness and diversity of the European cultural heritage. The WP will market the service to end-users world-wide, and increase the number of returning users. End-user research and testing and monitoring of market developments will further build our understanding of user needs and preferences. These will drive the development of the

portal, its usability and services offered. To target marketing for effective returns the analysis of the content and user base of Europeana will be used. To showcase and create wider access to the content, curated, online exhibitions around themes and topics of European interest will be created. WP3 defines the content strategy and WP2 develops the content plans. WP1 invites users to enrich selected topics adding their own stories and items to the Europeana content. The WP should establish Europeana as the resource for European cultural content. This doesn't necessarily imply that users need to visit Europeana.eu to find what they are looking for, but that Europeana ensures the content is placed in the path of the user. The WP will therefore work with content providers and other third parties via social networking, to ensure that Europeana content is found in a multitude of applications and social media websites and placed in the users' preferred working environments via APIs.

The WP activities include the following:

- Identification of end user target groups for Europeana.eu and knowledge of end user behaviour
- Continuous capture of end user needs and preferences in search and use of digital cultural heritage
- User requirements to develop Europeana functionalities and end user services, to suit end user needs
- Increase of the usage of Europeana.eu directly and via API's
- Addition of user generated content [UGC] in Europeana
- Test proposed functionalities and services from WP7 and WP2 to incorporate them in Europeana

Internal WP leader: Marketing and Communications Manager

Description of work (iii)

Task 1.1: Develop end user and market insights (PM1-PM29)

End user insights regarding preferences in content, search behaviour, features and media use give input to future development of Europeana and the marketing and communications strategy. Understanding alternative services in the market and their use is also important. Activities include:

- Market research and end user research in relation to Log file analysis
- Identifying key developments in the online media and cultural heritage sectors
- Developing knowledge of the market and end user needs to inform end user requirements and communications
- Establishing a User Research Work Group, from partners of the thematic network to share knowledge, define research priorities and review outputs.
- Use of user test panel to test each iteration of the portal
- Yearly user testing
- Developing Key Performance Indicators for Management and Stakeholders

M1.1 End user research plan, PM3

M1.2 User testing plan and methodology, PM6

M1.3 User testing plan and methodology update, PM18

M1.4 Log file analysis and user testing results, PM 13

M1.5 Log file analysis and user testing results update, PM25

M1.6 Log file analysis and user testing results update, PM 29

M1.7 User Research Work Group activity plan, PM3

Overall, reporting on activities against plans will be done in 6 month project progress and Europeana Foundation interim and yearly reports

Task 1.2: Develop an end user marketing and communications strategy (PM1-20)

The marketing and communications strategy defines the groups of end-users to address and how. This is informed by the user analysis of task one. In accordance with the analysis of content to users of the Content Strategy in WP3, it will identify appropriate communication channels for Europeana content and services. A concentration on the social networking forms of marketing will be central to the strategy. User Generated Content projects will be designed to further increase user participation and involvement. Activities will include:

- Define end user target groups, based on the results of task 1
- Write a marketing and communications plan to reach end users, including defined content, services, branding, communication channels and social networking.
- Execute the User Generated Content plan, according to the Strategy of WP3, subtask 3.3 and in line with other UGC projects, for users to contribute content to Europeana

M1.8 Yearly Marketing and Communications Plan, PM7

M1.9 Yearly Marketing and Communications Plan, PM19

M1.10 User Generated Content Plan, PM 7

M1.11 User Generated Content Plan, PM19

Results against plans will be reported in the project progress and interim and yearly Europeana Foundation reports.

Task 1.3: Define end user requirements for Europeana.eu (PM1-PM29)

Europeana development should remain user centric. While Task 1 is aimed at understanding these needs, Task 3 turns user insights into user requirements and ensuring usability of the portal. Tasks include:

- Drafting user requirements for Europeana.eu and online services, to reflect end user needs and preferences identified in Task 1,
- Contracting a usability specialist to ensure all user requirements enhance usability of the site,
- Drafting user requirements for User Generated Content,
- Designing and altering the portal in line with users requirements,
- Maintaining and editing the static pages of Europeana.eu, including search tips, FAQ pages, 'about us' pages, to further enhance usability,
- Designing and altering the portal in line with users requirements.

Reporting on activities will be done in the Project Progress and Interim and annual Europeana Foundation reports.

D1.1 Usability report, PM12

Task 1.4: Increase the usage of Europeana.eu portal (PM1-PM29)

Central to the WP is the increase in usage of the portal itself. Task 4 also reports key performance indicators related to usage. Managing the end user feedback is also part of this task. Consequently, Task 4 includes:

- Execution of Marketing and Communications plan defined in task 2, with strong emphasis on social networking, to maintain a Europeana presence in various social media, used from 2011 onwards such as , Facebook, Linked in, Flickr , Youtube. Network partners will be encouraged to participate via WP2.
- Engaging and developing online communities related to Europeana
- Managing Search Engine Optimization and linkage, to drive traffic from search engines to the portal
- Virtual exhibitions, to be used on both the Europeana.eu portal and partner websites.

- Establishing and promoting projects on User Generated Content, in collaboration with partners in the thematic network and other projects.
- Monitoring and managing end user feedback on the Europeana portal
- Reporting on key performance indicators defined in Task 1.1 such as number of visits and of returning visitors, of inbound links, number of outbound links to providers content, API usage, trackbacks etc.

M1.12 Key Performance Indicators and user feedback reports PM12

M1.13 Key Performance Indicators and user feedback reports PM24

Reporting on KPIs will also be done in the Project Progress, Interim and annual Europeana Foundation reports.

Task 1.5: To increase the usage of Europeana content via online channels outside the Europeana.eu portal (PM1-PM29)

Europeana aims to provide maximum access to digital cultural heritage content. It will therefore enable distribution of the aggregated content to other sites and places online. This will be executed via API's. Mechanisms to monitor such distributed usage will be put in place. This channel marketing activity will include;

- Creating a channel plan for distributed content
- Developing API's for use in the established channels
- Executing the Channel Plan and monitoring results
- Working with third parties and service providers to leverage their communication channels
- Develop communication formats, services and materials for network partners, aimed at promoting Europeana content.

M1.14 Channel Plan for distributed content, PM4

M1.15 Channel Plan for distributed content PM12

M1.16 Channel Plan for distributed content, PM24

Results of Channel plan will be reported in Europeana Foundation annual reports

WP Resources:

Marketing Manager 0,90FTE (26,1MMs)

Marketing /research assistant, (29MMs)

Editorial coordinator (15MMs)

Editorial assistant (15MMs)

Web master (15MMs)

Intern (3 MMs)

Project assistant (5MMs)

Total WP months: 108,1 MMs

Subcontracting: Usability specialist, Log file Analysis, Market Research, Web Designer, Editorial

Deliverables (iv)

D1.1 Usability report, PM12

Work package number:	2	Start date or starting event:				Month 1	
Work package title:	Partner and Content Development						
Participant number:	1						
Participant short name	Europeana Foundation						
Person-months per participant: (i)	120						

Objectives (ii)

All partners of the Thematic Network are important to the future of Europeana. They are the political impetus behind Europeana and provide the content and knowledge. All work by the Thematic Network is voluntary and it is from here various working groups are formed. These working groups should compliment or contribute to those of the Europeana Foundation's Council of Content Providers and Aggregators, which is the sustainable future of the Thematic Network. The management of the working groups will be according to the requirements of the work packages and will be set up and reviewed annually from the start of the project.

Partners are considered to be: all content providers and aggregators, research institutions, projects contributing content and technology, funding partners such as Ministries and sponsors, private companies working within the thematic network. This requires a management of the sometimes contradicting politics of the different types of partners.

This work package continues the work of Europeana v1.0 to develop the network of content providers and aggregators, secure funding from Member States and nurture the wider stakeholder network represented by the Associations that are Board members of the Europeana Foundation and the Council of Content Providers and Aggregators. It serves to nurture and develop the network to be able to carry out the strategy of aggregation, distribution and facilitation.. It carries out the strategy of WP3 in relation to content and partners, developing aggregation, account management, funding, sponsors and revenue strategies, turning them into plans. Some focus will be given to the identification and development of business opportunities with public and private organisations contributing content, funding, technology and knowledge to Ev2

The expected outcomes of the WP are:

- Consensus building within and between the partner groups
- Further development and support of aggregation
- A promotion of the benefits of Europeana to its partners
- A stable funding, sponsoring and revenue stream for the sustainability of the service
- A fully working Council of Content Providers and Aggregators

Dependencies: WP3 Decision making in policies and legal issues will be determining the development of partners and wider network. WP5 with regards to the deployment of the content ingestion plan.

Expected Results: The expected results are strong partner relations contributing and supporting Europeana as an aggregator, distributor, facilitator and innovator.

The work package leader is the Business Development Manager

Description of work (iii)

Task 2.1 Partner Strategy and Plans (PM1-PM29)

Task 2.1 manages the partner and network structure within the Thematic Network. It will analyse and categorise the network of partners, identify gaps in partnerships and create development plans with and for each identified category. It will build consensus on the strategic direction of Europeana within and across these groups. It will facilitate communication and knowledge transfer within and without the network by holding workshops and events and working closely with WP4. There are 4 subtasks.

- A Strategic Analysis and Grouping of Stakeholders in relation to the business model
- Partner Strategy & Development Plan
- Network Knowledge Transfer to manage intergroup knowledge and politics
- Promote and support aggregation

Subtask 2.1.1 A Strategic Analysis and Grouping of Stakeholders in relation to the business model (PM 1-2)

The analysis will structure and categorise the whole Europeana partner network. This includes the aggregators, content providers, technology providers, projects, publishers, universities, ministries, the European Union and sponsors. Partners will be grouped according to similarities in business models. The analysis will be made to understand the relationships between them, determine areas of potential conflict and to identify gaps in content provision, services and funding. The outcome of this exercise will be a solid knowledge of this client base and how it needs to be approached.

M2.1 Strategic Analysis and Grouping of Europeana Stakeholders, PM2

Subtask 2.1.2 Partner Strategy & Development Plan (PM 4-27)

Based on the results of subtask 1.1 existing and potential partners (aggregators, content providers, aggregating projects, publishers, private and public, funders etc) are identified. Focus is on developing the business, managing its politics and mobilising partners to develop content, technologies, funding and knowledge for Europeana and the wider cultural and scientific heritage communities of Europe.

The identification and mapping of areas of conflict between institutions and ministries, between content providers and aggregators, between the desires of the European Union and the exigencies of the market place will form the basis of plan aimed at consensus building and resolution of differences that prevent Europeana reaching its full potential. On a more practical level a benefits plan for each of the groups will be developed with the groups, in line with the value propositions created under Europeana v1. The Partner Strategy and Development Plans will inform the Business Plans of WP3. Regular surveys of the Aggregator landscape will be undertaken to inform the plans of subtask 2.1.2. The Partner Strategy and Development Plan links to the Content Strategy WP3, subtask 1.3 and forms part of the Content Development Plan in task 2.2. It will also relate to the partners forming the workgroups in the Innovation Work package WP7. Reporting on the execution of the Partner Strategy and Development Plan will be within the Europeana Foundation Annual and Interim Reports.

D2.1 Partner Strategy & Development Plan PM 4

D2.2 Partner Strategy & Development Plan PM 16

Subtask 2.1.3 Network Knowledge Transfer (PM1-29)

This task will facilitate communication and knowledge transfer within and without the network by writing white papers, holding workshops and events and working closely with WP4. Some of the intergroup politics will be resolved in such activities. Work groups from within the Thematic partner network will be established and managed, according to need identified in the other WPs and in relation to the Partner Strategy and Development Plan of Subtask 2.1.2

Reporting will be in the Project Progress reports and interim and annual Europeana Foundation reports.

Subtask 2.1.4 Promote and support aggregation, distribution and facilitation (PM3-29)

Notwithstanding the segmentation of subtask 2.1.1 and the development of a Partner Strategy and

Development Plan, Ev2 will see further emphasis on Aggregation. Aggregator visits and participation in country specific conferences and events will be carried out. As well as other workshops under Subtask 2.1.3, a yearly Content Provider and Aggregator workshop, will be organised to address aggregation developments focusing on the internal constraints (technology, policies, governance structure etc) as well as external factors influencing the sustainability and development of aggregators (competition, market developments, users participation and technology development).

Aggregators and other partners will be encouraged to make use of the hub of content and technology created by Europeana. The promotion of the benefits and use of APIs and the various repositories of multilingual and ontological material as well as the open source code will be an integral part of all partner management. The Europeana Office will actively support through code, help and advice all new and existing aggregations.

Coordination with other WP's is required such as WP7 to share open source software tools and applications. WP4 will develop communication tools to be shared with the WP2.

M2.2 Yearly Content Provider and Aggregator Council Meeting, PM3

M2.3 Yearly Content Provider and Aggregator Council Meeting, PM15

M2.4 Yearly Content Provider and Aggregator Council Meeting, PM27

Reporting on the task will be done in the Project Progress reports and the Interim and Annual Europeana Foundation reports.

Task 2.2 Content Development Plan (PM1-29)

The Content Strategy Plan of WP3 will make use of content and user analysis to create a quality focused strategy for Europeana from 2012 to 2014. The strategy will inform the creation of a Content Acquisition and Development Plan. There will be a close relationship with Projects, Aggregators and Content Providers delivering metadata and to the encouragement of digitisation of content for the user. The plan will build on the work of Europeana version 1.0. The relationship with Partners and projects developing User Generated Content will be also be clearly defined in the plan. The plan will formulate an account management strategy and division for the Europeana Office to manage partners and content.

M2.5 Content Acquisition & Development Plan PM 7

M2.6 Content Acquisition & Development Plan PM 19

Task 2.3 Funding and Sponsoring Generation (PM1-29)

Matching funds for Ev2 and related projects continue to be needed. Some EU Member States have already contributed funding to Europeana v 1.0. The aim of task 2 is to identify more funding and sponsoring partner opportunities and approach potential contributors.

Subtask 2.3.1 Develop a three year Funding and Sponsoring Plan (PM1-29)

The three year Funding and Revenue Plan will identify and plan ways to implement funding and sponsoring opportunities with Ministries and Sponsors. The plan will ensure matching funds for overheads and related future projects. The subtask will report on progress as part of the Europeana Foundation Annual and Interim reports. It will also report to individual funding partners on request.

M2.7 Three year Funding and Sponsoring Plan, PM4

M2.8 Progress Funding Report, PM8

M2.9 Progress Funding Report , PM12

M2.10 Progress Funding Report, PM 19

M2.11 Progress Funding Report, PM23

D2.3 Funding Report, PM29

Subtask 2.3.2 Develop and nurture partnership funding and sponsoring (PM 1-29)

To raise the required financial contributions close relationships will be established with key decision makers in sponsoring and funding. Europeana will look into the opportunities for funding from private funds and corporate sponsorship, particularly tied to events.

Subtask 2.3.2 will make a register of corporate and private sponsors that are known to support the cultural sector in Europe.

Following this initial research the office will look at the most appropriate programmes to apply for and their deadlines and requirements. Based on the potential money available, likelihood of the request being successful, the resources needed to apply and the timing a shortlist will be created. Annual update of the registry will be made.

M2.12 Setup a registry of sponsors and funding organizations, PM7

Resources employed:

Business Development Manager	29
Business Development Co-ordinator	29
Business Development Co-ordinator	24
Account Manager	29
Projects Assistant	9
Total 120MMs	

Deliverables (iv)

D2.1 Partner Strategy & Development Plan PM 4

D2.2 Partner Strategy & Development Plan PM 16

D2.3 Funding Report, PM29

Work package number :	3		Start date or starting event:			Month 1	
Work package title:	Policy, Strategy and Service						
Participant number:	1	8					
Participant short name	Europeana Foundation	INA					
Person-months participant: (i) per	86,1	6					

Objectives (ii)

This work package provides strategic direction for Europeana by investigating new market and product opportunities, developing business plans, policies and strategies, and creating a knowledge-sharing environment for Europeana's network of partners. The work package will work in close cooperation with the customer-facing work packages (WP1, WP2 and WP7) to ensure that Europeana is placed as the major European facilitator and innovator in the area of online access to cultural heritage, moving on from its dominant positioning in Europeana v1.0 as a super aggregator of content.

The baseline for all developments in Ev2 is the multiannual business plan that is the product of this work package. Each year the business plan will be updated to reflect the developments and revisit the priorities for the coming year. The annual business plan will set high-level priorities for all major development and operational work packages of the project (WP1, WP2, WP4, WP5, WP6 and WP7) and the corresponding product and service plan will outline the activities to be carried out in each one of them. These are the pivots of the business and therefore Ev2. WP3 is therefore the driver and decision maker for all other WPs. The reporting envisaged and controlled by WP8 will be against the business plans and product and service plans.

Continuing the work started in Europeana v1.0, the work package will expand the portfolio of policy documents on topics of importance such as Access, IPR, Metadata, Interoperability, Content use and re-use

and Multilingualism.

Innovation of product and service will ensure that Europeana remains a state of the art service and provider of services for users, the cultural heritage and research communities

All strategy and plans will make use of the input and analysis of working groups to be developed such as users, innovation, aggregators, IPR. These working groups will be set up under WP2, using individuals from the Thematic Network, representing institutions and personal expertise.

The expected results are:

- Business and Product Plans
- Policies to support the mission of the Europeana Foundation
- A product development strategy focused on the wide distribution of Europeana content

Work package leader; Business Development Director

Description of work (iii)

Task 3.1: Strategy and Organization (PM1-29)

The objective is to develop strategies to continuously build and refine a compelling value proposition for the client and stakeholder groups that have been identified in the business model of Europeana version 1.0. These strategies are reflected in the organisation of Ev2.

Subtask 3.1.1- Develop and update the Annual Business Plan (PM1-29)

A multiannual business plan 2012-2015 will be the baseline for yearly updates to reflect the fast changing environment we are operating in. It will make use of the input as provided by the customer facing Work packages WP1, WP2 and WP7 as well as market and user analyses. It will include strategic objectives as well as the budget for the overall operation of Europeana, including EU project and external funding, (the budget specifically for Ev2 as a project will be maintained in WP8) and expected outcomes. This task includes the management of the business according to this plan. The plan will be validated by the Thematic Network and approved by the Europeana Foundation.

D3.1. Business Plan 2012-2015, (PM4)

D3.2 Business Plan 2013-2015 (PM15)

D3.3 Business Plan 2014-2015 (PM27)

Subtask 3.1.2 Product and Service Plan (PM1-29)

Based on the Europeana Foundation vision and strategy and the Business Plan an annual Product and Service Plan and corresponding Work plan will be delivered outlining the roadmap and business priorities of Europeana. Quarterly meetings to check progress against the Product and Service Plan will be held and half yearly these will be reported as milestones. It will receive input from and outline the activities to be carried out in WP1, WP2, WP4, WP5, WP6 and WP7 in the coming year. The Plan will be approved by the Europeana Foundation.

D3.4 Product and Service Plan and Workplan 2011 (PM5)

D3.5 Product and Service Plan and Workplan 2012 (PM17)

D3.6 Product and Service Plan and Workplan 2013 (PM29)

Subtask 3.1.3 Content Strategy (PM1-29)

In coordination with WP1, WP2 and WP6 the content strategy of Europeana v1.0 will be further developed and executed to provide the best possible value for end users and stakeholders and to innovate with partners from the Creative Industries who will re-use the content for new information services. This subtask includes content acquisition and data quality improvement from cultural institutions and the development

of user generated content to compliment and enhance the institutional holdings. It will analyse the Content accessible by Europeana against the users to establish gaps and target groups for WP1 and WP2 to fill. The strategy will be informed by the Council of Content Providers and Aggregators and others within the Thematic Network and approved by the Europeana Foundation.

D 3.7 Content Strategy PM6,

D 3.8 Content Strategy PM 18

Task 3.2: Policy Development (PM1-29)

Europeana will continue to develop forward looking policies to enable the wider use of cultural heritage material by the Europeana service as well as external services in the network.

Develop and review a policy portfolio as-needed to further the objectives of Europeana and its partners. This could include a policy on content re-use, on disability services, on the continued alignment of Europeana with the Public Domain, multi-lingual aspects, semantic operators, user-generated content, persistent identifiers, etc. The priorities regarding the policy portfolio will be reviewed and refined in the annual business plans and product and service plan and work plans and in accordance with Europeana Foundation direction. The policy portfolio outcomes such as white papers and charters will be disseminated in close cooperation with WP4 (Dissemination). Close collaboration will be sought with partners from the thematic network to leverage knowledge and resources for the development of policies of common benefit. Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports.

Task 3.3: Product Development (PM1-29)

New products and services will be identified and designed to ensure Europeana will remain a state of the art service. This includes developments on the Europeana portal for the end-users as well development of services to partners such as API's. This task will require close cooperation with WP7 and technology where new technical solutions will be identified. The task will bridge the research (WP7) with the technical Work Package (WP5) for the actual development of some of the products proposed. It will include the turning operational the results of the associated Europeana projects where appropriate and feasible. Taking the high level priorities of the annual product and service plan, it will create a release based schedule of project development. Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

Subtask 3.3.1 Identify and develop new product opportunities (PM1-29)

New product ideas will be generated via an innovation programme making use of market knowledge, the User Development and Innovation work packages and by liaising with the Europeana family of projects. These ideas (such as improved API's for re-use on other sites) will be developed into business opportunities.

With input from WP7 workgroups and the innovation programme a set of plans will be developed to deliver products and services in Europeana.eu and for Europeana Open and API. These plans should meet user and partner expectations as well as comply to the overall strategy. The plans will be in line with the Europeana release schedule. The annual product and service plan will detail the product and service lines to be developed in the coming year and the work plan will define the relationship between WP7 (innovation) and WP5 (technology).

M3.1 Product Development Plan, PM6

M3.2 Product Development Plan, PM12

M3.3 Product Development Plan, PM18

M3.4 Product Development Plan, PM24

Subtask 3.3.2 User requirements (PM1-29)

In this subtask the approved product and service developments will become user requirements and progress

monitored. The requirement workflow as developed in Version 1.0 will be adhered to.

Milestones: User Requirements per release (actual dates will be defined after the annual releases planning)

Task 3.4 Market Revenue Research , PM9-23

Subtask leader Daniel Teruggi, INA

This subtask aims to investigate the revenue generating opportunities from the private sector for Europeana after 2013. Potential partners in creating new revenue streams may be identified with publishers/web-suppliers/mobile providers/private & public), including affiliate income programmes for content providers. Examples are click-pay, traffic generation share etc. The task will investigate opportunities in the cultural heritage sector and beyond and will rate and quantify these opportunities for Europeana. It will invite experts from outside the Thematic Network to contribute expertise and validate the ideas through a representative Work Group of Ev2.

M3.5 Market Revenue Investigation Results, PM 11

M3.6 Market Revenue Investigation Results, PM 23

Subtask 3.4.1 Implement revenue generation opportunities (PM12-29)

A plan for the implementation of subtask 3.4 will be developed and reported in the Europeana Foundation Annual and Interim reports.

M3.7 Develop a Revenue Generation Plan, PM14

M3.8 Develop a Revenue Generation Plan, PM25

Resources required:

- Business Development Director (0,60*29=)17,4 Ms
- Director (0,40* 29=) 11,6 MMs
- Content Director= 11,6MMs
- Product Manager:14,5MMs
- Project Assistant, 19MMs
- Project Coordinator: 12MMs
- INA: 6MMs

Total: 99,6 MMs

Deliverables (iv)

D3.1.Business Plan 2012-2015, PM4

D3.2 Business Plan 2013-2015 PM15

D3.3 Business Plan 2014-2015 PM27

D3.4 Product and Service Plan and Workplan 2011PM5

D3.5 Product and Service Plan and Workplan 2012 PM17

D3.6 Product and Service Plan and Workplan 2013 PM29

D 3.7 Content Strategy PM6,

D 3.8 Content Strategy PM 18

Work package number :	4	Start date or starting event:				Month 1	
Work package title:	Corporate Communications						
Participant number:	1	2	5	6	10		
Participant short name	Europeana Foundation	BL	MCU	NLP	DeptTCS		
Person-months per participant: (i)	77	23,2	9	6	6		

Objectives (ii)

Corporate Communications plays a central role in Europeana, establishing the brand among stakeholders through knowledge-sharing events and activities targeted at the Europeana group of projects and beyond.

The work package has the following goals:

- Plan and execute corporate communications to position Europeana at the forefront of digital cultural heritage policy-making, interoperability and delivery
- Gain the engagement and confidence of policy makers and political stakeholders, including the Commission and national governments
- Reinforce the commitment of the Europeana partner network and project group to the Europeana brand
- Use the partner network and the project group to create the magnifier effect that furthers Europeana's mission in their national and domain networks
- Support the customer-facing work packages (WP1-User Development, WP2- Partner and Content Development WP7-Innovation) with communication and dissemination tools and activities to stir the participation and commitment of the thematic network.
- Build stakeholder value by promoting the uptake of Europeana models, policy positions, APIs and application code.
- Contribute to innovation in the digital cultural heritage sector by sharing more explicitly the information outputs and knowledge delivered by Europeana and the group of related projects
- Ensure that good practices and resources in the Europeana group of projects are implemented to drive cost-efficiencies, develop the network and generate business opportunities.

The WP is led by the British Library and will target all Europeana stakeholders including:

- Policy makers, funders, the Commission, politicians at the national and European level
- The Europeana Foundation, the partner network and Workgroup members, current and potential content providers and aggregators
- Intermediaries such as the Open Source community and installers of the Europeana API
- Interested professionals seeking to model their work on Europeana's developments in e.g. interoperability, data modelling standards, IPR etc.

Description of work (iii)

The work is broken down into 4 tasks:

Task 4.1: Corporate communications (PM1-29)

The first task will strengthen the Europeana brand and promulgate the outputs from the other work packages. It will therefore, work closely with WP 1 (User Development), WP2 (Partner Development) and WP3 (Strategy, Policy and Service), to avoid duplication of effort, to ensure a consistent approach and the separation of target audiences. The main activities of the task are:

- Update the Europeana branding strategy and execution in line with the business and product and service plans and workplan from WP3 and the market conditions at the start of the project.
- Deliver a Corporate Communications plan that outlines targets, messages, channels and platforms. It will be updated annually.
- Renew, migrate and re-launch the Europeana v1.0 project website as Ev2.
- Develop and maintain a collaborative project space for partners
- Work with the full range of online and offline media, scholarly journals and trade press on PR messages and articles in support of Europeana's corporate objectives

Reporting will be in the Europeana Foundation Interim and Annual Reports

M4.1 Ev2 public website PM2

M4.2 Europeana branding strategy review PM5

M4.3 Europeana branding strategy review PM24

D4.1 Corporate communications plan PM7

D4.2 Corporate communications plan PM21

Task 4.2: Events (PM1-29)

Task partners: British Library; Europeana Foundation; the Ministry of Culture (Spain); the Department of Tourism, Culture and Sport (Ireland); the National Library of Poland.

The task co-ordinates the participation of Europeana in a series of important events and conferences to reinforce Europeana's position as a major player and innovator in the cultural heritage sector. Europeana will develop its plenary event for the network into a major annual conference on digital access to cultural and scientific heritage. This will form the plenary event for the network. This event will set the agenda by identifying and examining key topics, and set out Europeana's position on priorities in digital access to heritage. These annual conferences will attract 300+ members of the Thematic Network and stakeholders from museums, libraries, archives and policy sectors.

The Europeana office will take a co-ordinating role but the organisation and execution will be carried out by Work Package partners. These will be the National Library of Poland and the Department of Tourism, Culture and Sport in Ireland for the conferences that will coincide with the EU presidencies in Poland 2011 and Ireland 2013, and the Ministry of Culture in Spain for 2012.

Besides organising these annual plenaries the task will :

- Develop a programme of Europeana-branded conferences, briefings and workshops targeted at political stakeholders, content providers and project partners
- Create communications material to support v2.0, all Work Packages and the Europeana project group; e.g. materials for conferences, poster sessions, workshops etc
- Ensure other relevant organisations' conferences and events give a high profile to Europeana. Work with the project team, Work Package leaders and partners to develop suitable presentations and workshops, assign speakers and co-ordinate calls for papers.

The corporate communications plan will serve as the basis for the annual activities and reporting will be done in the Europeana Foundation Interim and Annual Reports

M4.4 Annual Europeana Conference Poland PM3
 M4.5 Annual Europeana Conference Spain, PM15
 M4.6 Annual Europeana Conference Ireland, PM27

Task 4.3: Uptake of Europeana activities (PM1-29)

Task 3 will raise awareness and generate uptake of the Europeana concrete outputs in terms of services, tools, software, code as well as policy positions and strategies that create value for the cultural heritage sector. This task will use meeting and networking structures for information and knowledge exchange to support Europeana, the project and its Thematic Network. The partners and R&D actors will work together to develop products or share knowledge and information on good and bad practices. The Thematic Network will be used to create relevant working groups.

In collaboration with WP6 [Technology], WP 5 [Operations] and WP7 [Innovation] the task will communicate the opportunities Europeana Labs offers to technical partners and the Open Source community to develop new applications and innovative services. It will also build take-up of services around APIs, linked data and other Europeana technology-related developments. In collaboration with WP2 [partner development] it will promote the value of the aggregation model to the cultural heritage communities and policy makers in all Member States and domains. It will inform and influence stakeholders on policy positions taken by Europeana, in relation for example to licensing of content, public domain issues, User Generated Content and linked data. The output of this activity will be the publication of a series of White Papers in collaboration with WP3T2 that will position the Europeana Foundation and Europeana as thought leaders in the field of access to digital cultural heritage.

Activities in the task are defined by the Business Plan and the Annual Product and Service plan of WP3 that identifies the priorities and the targets for the coming year.

Reporting will be in the Europeana Foundation Interim and Annual Reports

Task 4.4: Working with the Europeana Projects Group (PM1-29)

Co-ordinate the communications activities of related portals including Archives Portal Europe, The European Library, European Film Gateway etc, in relation to Europeana. The task comprises the following subtasks:

Subtask 4.4.1 Ensuring knowledge transfer (PM1-29)

The goal of the task is to ensure that knowledge transfer in common areas of work among the projects is achieved and that our approaches are consistent, synergies are developed and overall value for money is achieved in promoting these complementary EC-funded services. The need for collaboration in the individual areas of work has been identified already in Europeana v1.0 and cluster groups have started to build to align activities and knowledge exchange to share and scale results at the European level, these will continue in Ev2. Further work will be done to analyse results, gaps and issues and plans will be put in place to resolve them and to maximize results.

The Projects Steering Group will hold bi-annual meetings.

Subtask 4.4.1 Coordination of the Communications activities (PM1-29)

This subtask coordinates the communications activities of Europeana-related projects running concurrently with v2.0, using the v1.0 WP5 “Europeana projects comms group” as a model. Two meetings of the group are targeted per year. Reporting will be in the Europeana Foundation Interim and Annual Reports

In order to fulfil the tasks, the following personnel are required

0.8 FTE Head of corporate communications- external) 23,2 MMs
 Marketing/ PR coordinator, 29MMs
 Editorial coordinator: 14MMs
 Editorial assistant: 14MMs
 Projects Assistant, 10 MMs
 Intern; 3 MMs
 Webmaster: 7MMs
 NLP 6 MMs
 DeptTCS 6 MMs
 MCU 9 MMs
 Total: 121,2 MMs

Deliverables (iv)

D4.1 Corporate communications plan PM7

D4.2 Corporate communications plan PM21

Work package number :	5	Start date or starting event:					Month 1
Work package title:	Operations						
Participant number:	1						
Participant short name	Europeana Foundation						
Person-months per participant: (i)	146,8						

Objectives (ii)

This work package will carry out the planning, management and implementation of work related to the development and delivery of the Europeana data repository and the maintenance of the Europeana data model. Both the data repository and the data model were defined and implemented in EV1 and this workpackage will further develop both to improve the quality of the user experience of Europeana.

The focus of the work will be the improvement of the quality of the data and increasing the quantity of resources available in collaboration with current and future data providers and aggregators. There is, therefore, very close collaboration with WP3 T3 , responsible for Content Strategy and WP2 Task Content Acquisition and Development plan. The quality of the user experience can be enhanced by further development of policies and strategies for the resources to be encompassed by the Thematic Network and incremental improvements in the information model used to represent the data in the repository.

The quantity of resources will be increased by enhancement of the ingestion workflow implemented in EV1 and provision of related support material for providers. To ensure that quality and quantity improvements can be adequately tracked, measured and controlled the reporting aspects of the repository will be developed.

WP5 is dependent on WP6 for tools and infrastructure supporting ingestion workflow, repository maintenance and access to repository.

Input from WP2 regarding the development and management of the Content Providers & Aggregators accounts is necessary as well as from WP3 for the Content Strategy. Some input is expected from WP7 as well with regards to proposing innovative solutions for the back-end management and enrichment of the data.

At the point of writing this proposal it is unsure whether the outsourcing of Content Ingestion would be advantageous. This will be investigated in 2010 and if outsourcing appears to be the optimum solution, some modifications to this workpackage could be required. Some of the costs for such outsourcing have been included in the IT budget at this stage.

Description of work (iii)

Work package leader Data Ingestion Manager

A full-scale ingestion workflow was established during the Europeanav1.0 project. It provides tools and procedures to support and ensure the submission of metadata from content providers and aggregators into the Europeana repository.

This work package covers the development and execution of the ingestion workflow and related components. It defines the requirements for further improvement of the workflow, the collaboration and support of the partners contributing data. Including the following:

- Ingestion workflow: account management, harvesting, processing and storage in repository
- Quality management
- Reporting on ingestion progress and data quality
- Support for data providers and aggregators for data submission
- Europeana data model

Task 5.1: Ingestion operations (PM1-29)

Improve ingestion workflow and create a data ingestion plan according to criteria set in Content Strategy (WP3T3), and submission requests made by Data Providers and Aggregators encompassing changes arising from development of the Europeana data model and technical developments of the operational service. Execute the ingestion workflow. Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

M5.1 Improved ingestion workflow suggestions and requirements, PM 8

M5.2 Data Ingestion Plan, PM8

M5.3 Data Ingestion Plan, PM20

Task 5.2: Quality assurance of repository (PM1-29)

Create a Quality Assurance specification to ensure a uniform high standard of resources ingested into Europeana. Develop reporting functionality to support the implementation of the Quality Assurance specification and tracking of the quantity of resources ingested. Detect the need for and oversee the semantic enrichment of data. Inform WP2 where improvements can be made by the projects and content contributors.

D5.1 Content quality specifications, PM 8

D5.2 Content quality specifications, PM20

M5.3 Content report PM6

M5.4 Content report PM12

M5.5 Content report PM18

M5.6 Content report PM24

Task 5.3: Support for providers and aggregators (PM1-29)

(Task leader: Interoperability Manager Subcontract)

Development of the portal will consist of a series of releases over the three year term of the project to include changes with impact on the data supplied by providers. This task will ensure on-going interoperability through the periodic update and enhancement of resources to support Data Providers and Aggregators. This will include producing and updating documentation and guidance materials relating to the data ingestion workflow and data validation tools such as the Content Checker. Production of further specifications, recommendations and guidelines based on standards and best practice regarding the contribution of data to Europeana including the provision of a Technical FAQ. Specification of requirements for improving the ingestion workflow tools and procedures.

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

D5.3 Up-to-date guidelines, PM29

Task 5.4: Operational data model (PM1-29)

(Task Leader: Scientific Coordinator)

Maintain and update the model. Create new requirements, when required, to support technical and data related changes needed in the portal and the repository. The changes should support the operational functions of the Europeana portal and services, and will be made in connection with the R&D work on refining EDM carried out in WP7.

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

D5.4 Further development of the European Data model EDM, PM29

Capacity:

Europeana Foundation: 43,3 MMs are allocated from Europeana v1.0. Other posts are covered by the partnerships of Europeana in contributing projects and by subcontracts in other projects accepted by the Commission. This WP makes use of interns from the library schools, up to 4 over the lifetime of the project.

Tech and Ops director: 10,3 MMs

Data Ingestion Manager: 29MMs,

Intern: 26MMs

Product and Services Manager: 14MMs

Scientific Coordinator : 9,5MMs,

Ingestion Specialist : 29MMs,

Collections Assistant: 29MMs,

Total: 146,8 MMs

Subcontract for interoperability: €50,000

Note: The capacity for the ingestion tasks will need to be re-assessed regularly as they depend on the number of providers and aggregators interacting with Europeana for data submission during Europeanav2.0 as well as the target volumes for the repository (number of digital objects represented).

Deliverables (iv)

Deliverables:

D5.1 Content quality specifications, PM 8

D5.2 Content quality specifications, PM20

D5.3 Up-to-date guidelines, PM29

D5.4 Further development of the Europeana Data Model. PM29

Work package number :	6		Start date or starting event:			Month 1	
Work package title:	Technology						
Participant number:	1	9					
Participant short name	Europeana Foundation	CNR-ISTI					
Person-months per participant: (i)	198,1	31					

Objectives (ii)

This work package objective is to maintain optimum technical performance for Europeana by

- Maintaining the hosting environments for Europeana
- Managing the in house and external partner development teams including testing and acceptance procedures
- Managing prototyping and releases of software and functionality in Europeana

Description of work (iii)

The Technology work package covers the hardware and software requirements of Europeana.eu and its partner projects. The communication between the business and the technological development is via user requirements and each release is coordinated and managed by a technological product manager.

Work Package Leader: Technical & Operations Director Europeana

The Tasks are:

- Hosting of Europeana.eu Repository & Portal
- Hosting and maintenance of the Development & Open Source environments
- Maintenance of software and procedures
- Development and integration of new functionality
- Release management and deployment
- Test & Acceptance management

Task 6.1: Hosting of Europeana.eu Repository & Portal (PM1-29)

(Task Leader: Jan Molendijk, Europeana Foundation)

Europeana v1.0 has developed a stable platform, consisting of distinct testing, acceptance and production servers. Providing industrial strength 24/365 hosting and system management support is not something a small organisation, such as the Europeana Office, can perform by itself. The hosting of the Europeana Database and Portal (Europeana.eu) as well as the acceptance and test environments will therefore continue to be outsourced, for which an amount of €790,000 is reserved in the Ev2 budget. If the growth of traffic and data exceeds our expectations, this figure may have to be revisited.

The management of the contract and the Service Level Agreement is undertaken by the Europeana Office and therefore falls under this WP of Ev2. The key performance indicators of the outsourcing will be

reported in the Project Progress Reports and the Europeana Foundation Interim and Annual reports

Task 6.2: Hosting and maintenance of the Development & Open Source environments (PM1-29)
(Task Leader: CNR-ISTI, Carlo Meghini)

The basis of the success of Europeana development is a stable development environment to support and encourage collaborative development, and enable versioning and risk-management. EuropeanaLabs, developed in the course of Europeana v1.0, is an environment built on the lessons from distributed Open Source development principles, and thus ideally suited for this task. It has already proven to be effective in encouraging and enabling developers from other European projects to contribute relevant modules.

Next to the EuropeanaLabs environment there may be an Open Source version of the Europeana software, tentatively named OpenEuropeana, subject to a feasibility study carried out in Europeana v1.0. This Open Source version would be facilitated with hosting facilities, but in a separate environment.

As in Europeana v1.0, all development and Open Source environments will continue in v2.0 to be hosted and maintained by CNR-ISTI who provide the infrastructure and the human resources for the smooth operation of the service. This will be monitored and controlled under this work package by Europeana Office. The Open Source environments will be the main instruments of support to WP7 (Innovation) and to the Open Source community of developers to be animated by WP7T1. With the help of WP3, WP6 and WP7 will therefore work closely to ensure the Open Source environments serve the needs and practices of the Open Source Community that will be formed around Europeana. The process will be described in Task 4.

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

Task 6.3: Maintenance of software and procedures (PM1-29)
(Task Leader: Europeana Foundation, Shamilla Verholt-Landa)

The task is responsible for determining, recording, evaluating and classifying development requests and problem reports, as well as bug fixing, and software and configuration changes to deal with (planned) changes in environment etc.

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports concentrating on any deviation from planned work

Task 6.4: Development and integration of new functionality (PM1-29)
(Task Leader: Europeana Lead Developer)

The task will focus on improvement to the portal and APIs and of the process and system ingestion. Improvements will be planned in the annual Product and Services Plans and resulting Work Plans. A substantial part of the development capacity in Ev2 will be dedicated to integrating components that are developed in other projects in the Europeana Group, such as Europeana Connect, ASSETS, and new projects running in parallel with Ev2

We also expect ideas and source code for new functionality to come from Europeana Labs and the Europeana Open Source environment.

A procedure will be established for the development and acceptance of requirements for the development and integration of functionality. Planned integration of agreed functionality or development will be included in the annual product and service work plans.

WP6 will also implement any viable results or ideas from WP7

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports

M6.1 Technical contribution to D3.4, Product & Service Plan 2012 (PM4)

M6.2 Technical contribution to D3.5, Product & Service Plan 2013 (PM16)

M6.3 Technical contribution to D3.6, Product & Service Plan 2014 (PM28)

Task 6.5: Release management and deployment (PM1-29)

The Europeana products and services will be delivered through an iteration of small releases.

This task manages the content and realisation process of these releases. By ‘content’ we mean, for example, new data in the Europeana repository, new portal functionalities, bugs fixes etc. Therefore each release allies maintenance (bugs fixing, inclusion of small features) and availability of new/updated content and functions.

The approach for releasing features is based on the continuous integration process with regular review of functionality requests, bugs fixing requests and data ingestion plans. This allows for flexibility to deal with issues, changes of priority and ad-hoc requests.

We aim at delivering 1 to 3 releases per year, as specified in the annual release plan and defined by the product and service plan. Release content will be based on requirements delivered by the Business & Product Development team and on the technical feasibility evaluated by the Technical team.

A release’s content depends on the priorities set in the Product & Service Plan and will also take into account:

- Bug fixes requests
- Needs of Europeana partners and projects
- Needs to adapt to changes e.g. new technology platforms, compliance to external API’s etc.
- Available technologies to implement a functionality
- Assessment of risks when introducing changes to the operational service.

Milestones of the task are the Europeana releases (1-3) per year as defined in the annual Product and Service Plan. Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports.

1 release per year will be treated as a deliverable. There will be 2 such deliverables in the lifetime of Ev2

M6.4 Annual release plan, PM6

M6.5 Annual release plan, PM18

Task 6.6: Test & Acceptance management (PM1-29)

(Task Leader: Europeana Foundation, Jan Molendijk)

With several (smaller) releases per year, testing becomes part of the ongoing operation and should be planned and budgeted for accordingly. Requirement owners (in most cases: ‘the business development unit’) are responsible for testing that the solution provided conforms to the specification and satisfies the requirement. From this WP the testing process will be facilitated. In addition regression and stress testing needs to occur regularly to check that all improvements we add to the Portal and APIs really are improvements, and we do not introduce new problems, e.g., with performance or stability. Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports.

Reporting will be within the Project Progress Reports and the Europeana Foundation Interim and Annual reports.

Resources required

Europeana Foundation:

CNR-ISTI:

Product manager: 15MMs

Research: 3MMs

Configuration manager: 26,5MMs

Architect: 3MMs

Tech Doc Writer: 5,8 MMs

Developer: 15 MMs

Technical Director: 10MMs

Sys Admin: 9MMs

Technical Planner: 29MMs

Management: 1MMs

Technical Architect: 5,8MMs

Senior Developer: 29MMs

Senior developer: 29MMs

Junior developer: 29MMs

Junior developer: 12MMs

Webmaster: 7MMs

Deliverables (iv)

D6.1: Europeana.eu release report by PM12

D6.2: Europeana.eu release report by PM24

Work package number :	7		Start date or starting event:			Month 1	
Work package title:	Innovation						
Participant number:	3	4	7	1			
Participant short name	ONB	HU Berlin	Beeld en Geluid	Europeana Foundation			
Person-months per participant: (i)	4,5	26	25	10			

Objectives (ii)

WP Lead: Max Kaiser (ONB)

Objective of this work package is to continue to develop the Research and Development Community that has built up around Europeana. This community needs to be facilitated to continue to meet, to innovate and undertake research needed for the future of Europeana. Such innovation and research is also beneficial for the broad cultural heritage and research communities. The work package continues to encourage thought and practical innovation from the research elements of the Europeana network, which are currently managed under Europeana v1.0 WP3 and within the EuropeanaConnect project. It will form a working group of interested researchers, developers and innovators, based on WP3 of Europeana v1.0 that can be called upon to validate and discuss the work of the tasks below.

The work package will make use of EuropeanaLabs for experimentation, it will encourage new applications to be built and resolve problems of user involvement and user interaction, semantic web and multilingualism. It will develop the knowledge of the Europeana network in these areas and will continue to help through advice and knowledge exchange the development of Europeana and the wider environment. It will foster an open source development community.

Europeana has limited resources for development so the intelligent use of the wider, largely voluntary, communities of researchers and developers makes use of the collaborative nature of the web and creates strong buy in for Europeana's sustainable future.

There are 4 major areas of work which are outlined below:

- Developers Network and FLOSS Inventory
- Solutions for user interaction and user generated content
- Semantic Web / Linked Data
- Multilingualism

The work package will also report in the Progress Reports and the Interim and Annual Europeana Foundation Reports.

Description of work (iii)**Task 7.1: Developers' Network and FLOSS Inventory (PM1-29)**

(Lead: Johan Oomen, Beeld en Geluid)

Subtask 7.1.1: Research and Development Community (PM1-29)

This task will establish an open source Europeana Software Developers' Network (ESDN). The aim of ESDN is to establish and organise collaboration within the community of software developers linked to Europeana. Through a number of specific agreements and commitments the members of ESDN will provide

valuable support for the further development of the Europeana service, its use and impact. Members will be drawn primarily from developers currently involved in projects that are topically linked to Europeana (funded by the EU within eContentplus, ICT-PSP and FP7) and from other entities active in the Europeana Network.

Relevant topics for collaboration include but are not limited to:

- Applications for access provision, user interaction and user generated content. Examples are timelines, interactive maps, tagging games and annotation tools. (linked to Task 7.2)
- Applications for metadata management (i.e. the back-office), such as metadata mapping tools, components for metadata harvesting, linked data publishing, recommendation technology, ontology alignment. (linked to Task 7.3)
- Applications for multilingual access and translation. (linked to Task 7.4)

This subtask will provide a mission statement D7.1 The Europeana Software Developers Network to be written in close collaboration with at least five founding partners, to be solicited from the Europeana Network. (PM5)

Subtask 7.1.2: Inventory and documentation of existing applications (PM1-29)

Part of the work in this subtask will be to create an inventory of applications available as open source (FLOSS) software. A list of licences can be found on <http://opensource.org/licenses>. If necessary, the documentation of the software will be brought up to standard. The baseline for this work is provided by projects in past and current EU funding programmes. Outcomes from other initiatives will also be taken into consideration. The inventory will be a list of applications weighted and ranked against a list of properties, such as strategic importance, maturity of the code, level of support. The technical documentation of the key applications will be evaluated and aligned to match a common structure, based on the FLOSS Manuals framework. Active collaboration with the developers in the ESDN is instrumental in improving the quality of the documentation and the establishment of FAQs and other means of user-support. The inventory and related documentation will be published on the Europeana website.

This subtask will provide a Core Inventory of FLOSS in the Cultural Heritage Domain, released in two consecutive versions (D7.2. and D7.3) in PM6 and PM18. These deliverables will analyse the FLOSS landscape and provide the baseline for the development of innovative applications in Task 7.2

The subtask will conclude with a report in PM29: Report of Inventory of FLOSS Documentation and Sustainability (D7.4) which describes the work executed within the subtask and provide the strategy for sustainability post project.

Task 7.2: Development of innovative applications for user interaction and UCG (PM1-M29)

Lead: Johan Oomen, Beeld en Geluid

This task will improve, refactor or develop a number key applications identified in Subtask 7.1.1 as beneficial to Europeana and the wider European cultural heritage domain. The emphasis will be on innovative applications in the area of access provision, user interaction and User Generated Content. In collaboration with WP3 T3, a number of applications will be selected for integration or further development by ESDN and WP6 developers. These will be included in the Europeana annual product and service plans and workplans. All software will be made available in FLOSS for deployment **in- and beyond Europeana**. The code and documentation will be made available through the Europeana Website. In two consecutive reports (D7.5 and D7.6) we will report on the work performed (PM29).

Europeana Labs is available as the experimentation environment . The Europeana ThoughtLab will showcase some of the applications. Evaluation with end-users of selected applications will be coordinated in dialogue with WP1.

Workshops will be organized within the duration of the project in PM6, PM12, PM18 and PM24. Reports will be published on the Europeana project website and will be disseminated widely.

Task 7.3: Semantic Web / Linked Data (PM1-29)

Lead: Stefan Gradmann, HU Berlin

In this task we aim to develop and implement a research and innovation agenda complementing the central process for making Europeana ‘semantics aware’ and to integrate it seamlessly in the emerging paradigm of Open and Linked Data. This latter objective will be supported by complementing activities as part of WP3 providing policy and business support for the Linked Open Data (LOD) approach. The task described here supports this agenda on a technical and data modelling level. In general, work will be carried out by HU Berlin with help from a small group of core Experts taken from the Thematic Network and the work will be validated by a larger working group of the workpackage.

Subtask 7.3.1: Tools for semantic extraction (PM5-9)

Under Europeana v1.0 there are efforts to populate an EDM (Europeana Data Model)-based version of Europeana by migrating existing metadata to the EDM and in migrating related context data to SKOS and other ‘semantic’ standards. Complimenting and continuing this work and the work of Europeana Connect, the task will investigate **effective and efficient tools** for the extraction of concepts and named entities from digital text, image and audio resources that enable the automatic semantic contextualisation for object metadata lacking contextualisation links. Technology for semantic extraction is currently emerging and evolves into increasingly mature products. Europeana would aim to partner with one of the existing players active in this field.

The subtask described here will produce a **market study** (D7.7) in PM7 listing the technical options available as well as the relevant actors and technology providers as a basis for later decisions to be taken by Europeana independently of this project.

The study will be produced by HU Berlin, a **draft version** will be submitted to the core experts.

Subtask 7.3.2: Social Semantic Web (PM12-18)

This subtask adds a semantic component to the work being done as part of task 7.2 relating to the emerging Social Semantic Web paradigm. The double aim is to

- use User Generated Content (UGC) for automatically contextualizing information objects
- enrich the Linked Open Data (LOD) space with named entities and concepts that can be identified in the UGC.

The subtask will produce a **functional specification document** for this double aim as well as prototype code to be made available via OpenEuropeana (D7.8) (M18).

The specifications will be produced by HUB, a **draft version** will be submitted to the core experts. The prototype code will be produced in co-operation with the development community built in subtask 7.1.1. This subtask starts in PM12 and is accomplished in PM18.

Subtask 7.3.3: Model refinements for EDM (PM1-29)

From the very first attempts to validate the Europeana Data Model with the constituent communities of Europeana it has been evident that policies have to be devised to articulate EDM with more community-specific models. For example, the community of library providers is likely to benefit from the ability to represent in the context of EDM the relations between the entities of various FRBR groups, and more specifically within the Group 1 that distinguishes between ‘work’, ‘expression’, ‘manifestation’ and ‘item’.

This subtask will encourage and coordinate the design and sharing of these models.

The subtask will be carried out by HUB and will follow the work that needs to be done in the emerging EDM-profile oriented communities in various meetings and virtual collaboration settings. It will integrate these strands of work into an overall ‘big picture’ and take care this is consistently linked to the core EDM – the latter activity involves help from the core experts. Meetings will be formed from members of the Thematic Network Innovation Workgroup.

The result will be a synthesizing Report on Model Refinements for EDM (D7.9) in PM29. This subtask is a continuous activity spanning across the whole project lifecycle.

Task 7.4: Multilingual Access / Translation (PM1-29)

Lead: Vivien Petras, HU Berlin

By the time Ev2 starts, the implementation of a translation module for queries in at least 6 languages (English, French, German, Italian, Polish, Spanish) will be under way in EuropeanaConnect, providing users with automatic multilingual access to content from a querying perspective. Along with automatically enhancing provider content multilingually, thereby also naturally complementing the semantic enrichment processes described in Task 7.3, there will be a leverage on collaborative features to improve translations and add user-driven data in new languages. A key issue is the development of user interaction models to guide and maintain these processes for the Europeana portal and beyond.

The usability of multilingual access is a key task. User cases will be prepared and prototypes created together with the Development team of Europeana in WP6 and the usability expert in WP1. Three interweaving strands of inquiry will be pursued:

Subtask 7.4.1. Novel user interaction models for multilingual access to Europeana (PM1-M29)

This task will develop use cases and novel pathways to support multilingual access. This is an ongoing task that should not only encompass and apply to the two particular applications described below (user-assisted translation & object metadata enhancement), but also existing multilingual access components in Europeana.

This subtask will contribute to D7.10 (Report on user-assisted translation features) of subtask 7.4.2 (PM15) and D7.11 (Report on multilingual object enhancement) of subtask 7.4.3 (PM27). The deliverables will include user interaction models detailing suggested design and behavioural features of the new components. The results will be evaluated by the usability consultant.

Subtask 7.4.2 User-assisted translation (PM1-15)

This activity will look at novel methods to improve and enhance translation methods, including manual intervention in the form of user-assisted/user-modified translation suggestions. This will improve dictionary and translation systems with high-quality, intellectually supervised data, which might add complementary domain-specific terminology. Other possibilities to leverage user-provided data will also be investigated. The aim of this activity is to enrich standard machine translation efforts based on dictionaries with complementary methods including user-driven data as well.

This subtask will result in a Report on User-assisted Translation Features (D7.10) (PM15) which will draft user-assisted translation features for Europeana including interaction models for incorporation into the current system based on a data analysis of Europeana searches and prototypical development. These would be worked on by the Usability expert and tested by the Thematic Network in WP2 and Users in WP1.

Subtask 7.4.3 Leveraging user-driven & multilingual semantic data for enhancing Europeana object metadata (PM1-M27)

In cooperation with task 7.3, this subtask will enrich multilingually the existing content in Europeana. This includes activities such as language identification of content, enrichment methodologies, tuning of the Solr search engine for multilingual treatment and potential further adjustments to the Europeana infrastructure to enable truly multilingual user interaction.

This subtask will result in a Report on Multilingual object enhancement (D7.11) (PM27) which will develop a staged model of multilingual metadata enrichment in accordance with existing Europeana ingestion processes as well as incorporating the further development of EDM and multilingual indexing processes. The report will describe potential enrichment sources and a detailed model how to add multilingual content and represent that to users and content providers alike. Potentially prototypical implementations based on Europeana object descriptions can show the validity of the proposal. These would be worked on by the Usability expert and tested by the Thematic Network and Users.

Task 7.5: Work Package Coordination

Lead: Max Kaiser, ONB

This task will lead WP7 and represent it as required in management activities led by the Coordinator and at Reviews.

Subtask 7.5.1 Monitoring and QA [M1-M27]

This task will monitor the performance of tasks 7.1 – 7.4 and will organise QA of WP deliverables and milestones in collaboration with WP8, T8.4. This task will ensure timely submission of deliverables and contribute to keeping the project's Risk Register (WP8, T8.4) up-to-date.

Subtask 7.5.2 Liaison with the task leads in WP7 and the Europeana teams [M1-M27]

This task will ensure that requirements provided by the Europeana business and technical teams (WP1, WP3, WP6) will be fed into planning of tasks 7.1-7.4. It will act as liaison with the Europeana core team. Monitoring of WP progress and risk assessment will be supported by monthly teleconferences with the task leads and regular WP meetings, attached to general project meetings when possible.

Subtask 7.5.3 Reporting and contribution to dissemination strategy [M1-M27] This task will provide input for the Project Progress Reports (M8.27-30) in PM6, 12, 18 and 24, for the Interim Reports (M8.25-26) in PM12 and 23, and for the Europeana Foundation Annual Reports (D8.1.-D8.2) in PM8 and PM19. It will also contribute to the dissemination strategy led by WP4 by inputting views on publications and conference strategy.

Resources:

Europeana:

Scientific coordinator: 5Ms

Projects Assistant: 5Ms

Beeld en Geluid:

Junior researcher: 14MMs

Senior researcher: 11MMs

ONB Coordination: 4,5Ms

HU Berlin Researchers: 26Ms

Deliverables (iv)

- D7.1 The Europeana Software Developers Network Mission Statement (M5).
- D7.2 Core Inventory of FLOSS in the Cultural Heritage Domain, first iteration (M6)
- D7.3 Core Inventory of FLOSS in the Cultural Heritage Domain, second iteration (M18)
- D7.4 Report of Inventory of FLOSS Documentation and Sustainability (M29)
- D7.5 Report on innovative applications, first iteration (M18)
- D7.6 Report on innovative applications, second iteration (M29)
- D7.7 Market study on technical options for semantic feature extraction (M7)
- D7.8 Functional specifications for social semantic functions and prototype code (M18)
- D7.9 Synthesizing report on EDM application profiles and their links to the core EDM (final version). (M29)
- D7.10 Report on User-assisted Translation Features (M15)
- D7.11 Report on Multilingual Object Enhancement (M27)

Work package number:	8	Start date or starting event:					Month 1
Work package title:	Management and Finance						
Participant number:	1						
Participant short name	Europeana Foundation						
Person-months per participant: (i)	67,6						

Objectives (ii)

Work Package Leader: Programme Manager, Europeana

Ev2 provides the funding for a large part of the operational service Europeana.eu and its central office. The 'project' has been constructed to reflect the internal business units and normal management and reporting of the Europeana Office to Europeana Foundation. The overall management resides with the Europeana Management Team, under its Executive Director, who is responsible to the Europeana Foundation. Ev2 should support the internal business structure of the Europeana Office and work within its management and reporting structures to prevent duplication of effort.

Ev2 will start the process of moving away from project based reporting to business reporting.

Rather than create additional overhead Europeana would like to use the Europeana Foundation Annual and Interim reports as main deliverables of this work package. These reports will cover all the activities of the Europeana Office, in all of its projects. They will include the budgets and audited accounts for the total set of projects. At the time of writing this was 16 projects. This allows the Commission to have an overall picture of the activities of Europeana and ensures that the Europeana Foundation has a full overview of its business.

A set of specific progress reports on Europeana v.2.0 could be offered as part of good practice in project management. These would be milestones and contribute to the Annual and Interim reports of the Europeana Foundation. The progress reports will report on deviations from plans in the Description of Work, the KPI's and project finances and will be succinct.

WP8 acts as a programme management for Europeana Foundation whilst ensuring that Ev2 meets all of its targets and deliverables.

Objectives (ii)

- To programme manage all projects in which the Europeana Foundation is a partner
- To project manage Ev2 ensuring communication via meetings and teleconferences of external task and work package leaders with internal work package leaders.
- To report to the Commission on project progress and finance according to reporting requirements
- To develop Programme and project Management tools in collaboration with WP4 to cross-manage activities of the Europeana family of projects.

Description of work (iii)**Task 8.1 Programme Management**

Europeana now manages a programme of projects. It therefore requires a programme management rather than purely project management approach.

This task is responsible for overall programme (i.e. all projects Europeana is involved in) activity. The coordination of all project activities, plans, reporting and management of conflicts and deadlines across all of our projects. It acts as an arm of management, producing monthly management reports and discussing them in management team meetings. It will monitor the delivery of milestones and deliverables according to agreed time and budget and ensure that deliverables and milestones are delivered according to defined quality.

Responsibility for delivery of results according to plan rests with the WP leaders. WP8 will monitor activity and ensure deadlines are met. Overall leadership will come from WP3 and its Business and Product and Services Plans.

The task should manage issues and risks together with the Management Team of Europeana. It should identify the gaps internally and externally and create means of ameliorating them.

M8.1 –M8.29; 29 Monthly reports on the programme, containing risks and budget issues.

Subtask 8.1.1 Project Management of Ev2.

The subtask aims at complying with reporting requirements, at ensuring deliverables are completed on time and financial reporting is complete at the project level.

For the project specifically it will monitor the delivery of milestones and deliverables according to agreed time and budget and ensure that deliverables and milestones are delivered according to defined quality.

Liaise and report to the Project Officer, providing information on progress and deviations. Execute project progress reports for the EC at agreed reporting periods. As regards the financial management of the project, WP8 will submit financial statements, and will be responsible for the timely distribution of pre-financing to partners.

Subtask 8.1.2 Oversight of Ev2 subcontracts

The subtask ensures that all Ev2 subcontracts are let and invoiced as required by the Grant Agreement.

Task 8.2 Reporting

Each year a Europeana Foundation Annual Report will be produced covering all of Europeana's activities, including the associated projects. The Annual Report will include audited accounts, and a report of activities against plans. The interim reports will contain financial information across the programme. All the work of Ev2 will be included as Project Progress reports issued at 6 monthly intervals during the project. These will contribute to the Europeana Foundation Annual and Interim Reports.

Milestones

M8.30 Interim report 2012 M12

M8.31 Interim report 2013 M23

M 8.32 Project Progress reports PM6

M8.33 Project Progress reports PM12

M8.34 Project Progress reports PM18

M8.35 Project Progress reports PM24

Task 8.3 Programme and project Management Tools

WP8 will develop with WP4 the tools for project collaboration, for the exchange of information on project outputs and progress amongst project partners, e.g. as a collaborative online workspace including document store, wikis, mailing lists and other media where appropriate using lessons learnt in Europeana Version 1.0. These tools must work within the environments currently in place.

Maintenance of the project workspace and collaborative tools is the responsibility of WP8.

M8.36 Programme and Project Collaborative Space running PM1

Task 8.4 Quality assurance and risk management

In order to better ensure agreed standards of quality, it will be necessary to develop and maintain a quality plan and Quality Register for deliverables and milestones in particular. The Register will include the basic content outline of the deliverable or milestone, review status, sign-off, etc.

A risk management strategy will be developed based on lessons learnt in Version 1.0, and a risk register will be maintained and updated throughout the project's lifecycle. This will be tabled at Board Meetings of the Europeana Foundation for review and addition. A contingency plan will also be developed to address key risks. WP leaders will be encouraged to maintain an issue log although WP8 will maintain one centrally.

Resources:

Programme manager: 29,0 MMs

Project Coordinator: 17,0 MMs

Financial controller: 11,6 MMs

Projects Assistant 10,0 MMs

Total: 67,6 MMs

Deliverables (iv)

D8.1 Europeana Foundation Annual Report 2011 PM8

D8.2 Europeana Foundation Annual Report 2012 PM19

D8.3 Final Report CO PM29

D8.4 Final financial statement CO PM29

Table 5: Summary of staff effort

Participant No.	Participant Short name	WP1	WP 2	WP 3	WP 4	WP5	WP6	WP7	WP8	Total Person Months
1	Europeana Foundation	108,1	120	86,1	77	146,8	198,1	10	67,6	813,7
2	BL	0	0	0	23,2	0	0	0	0	23,2
3	ONB	0	0	0	0	0	0	4,5	0	4,5
4	HU Berlin	0	0	0	0	0	0	26	0	26
5	MCU	0	0	0	9	0	0	0	0	9
6	NLP	0	0	0	6	0	0	0	0	6
7	Beeld en Geluid	0	0	0	0	0	0	25	0	25
8	INA	0	0	6	0	0	0	6	0	6
9	CNR-ISTI	0	0	0	0	0	31	0	0	31
10	DeptTCS	0	0	0	6	0	0	0	0	6
Total		108,1	120	92,1	121,2	146,8	229,1	71,5	67,6	950,4

Table 6: Risk assessment

The table below lists identified risks, their possible impact and probability as well as remedial actions to be taken.

Description of Identified Risk	Description of Possible Impact	Probability	Preventative Actions
Political			
High level political change	Importance of Europeana might shift meaning threat to future positioning and possibly sustainability	low	Maintain best possible relations with all stakeholders and maintain awareness of political issues.
Strategic			
Lack of a strategy to deal with commercial operations such as Google Books, etc	Europeana is unable to either compete or partner with the commercial sector, leading to isolation and lack of development. Europeana does not capitalise on possible relationships	medium	Prioritise development of commercial relationships Improve decision making process
Tensions between political policy and market forces. E.g Google Books as a case in point.	The benefits to the user reduce as barriers to access are raised by commercial providers	medium	Systematic diplomatic efforts Improvement of understanding need to apply user demands
Lack of good will to collaborate by some domains and/or projects	Europeana brand is negatively affected, and user base declines	medium	Systematic efforts to ensure all domains work with Europeana
Absence of concrete steps on national aggregation	Weakens the Europeana business model and lessens a solid sustainability plan	medium	Activate, involve and discuss with the CCPA. Stimulate collaboration between current national aggregators where possible and pro-actively work with current national aggregators and those in their infancy.
Management			
The management structure becomes too complex: [Combination of EUROPEANA Foundation, Ev2, projects and Office]	Poor communication; Administrative overhead high	medium	Simplify. Programme manage and prioritise the management of the Europeana Office and the delivery of Europeana itself.
Insufficient capacity to manage the growing number of Europeana related projects	Failure to deliver on time and to budget, leading to loss of confidence from funding bodies	medium	Programme management and careful resource allocation.
Financial			
Global financial crisis	Negative impact on institutes budgets - and therefore on digitisation efforts. Impact on budget of Ministries will have a negative impact on fundraising for matching funding etc.	medium	Continued explanation of benefits for stakeholders showing return on investment and multiplier effect.

Sustainability of some aggregators (developed by projects) unsure	The content flow from aggregators to Europeana is decreased, and data may disappear from Europeana	high	Office to investigate next steps for vulnerable aggregators and find ways to help.
Legal			
Copyright law does not work well on the internet	Poor content representation in Europeana both country and 20th century coverage	medium	Lobbying of EU to exact changes in copyright law for the internet. Raising of awareness of ensuing problems.
Some providers reluctant to allow the commercial exploitation of metadata	Reduces the API and web service reuse possibilities for Europeana and therefore its impact.	medium	Clear policy document on what we mean and aim for with re-use of data (commercial and non-commercial)
Content			
Key content providers do not give content to Europeana,	Content targets may not be reached, Europeana brand is negatively affected, and user base declines	medium	Make use of Europeana Foundation to convince content providers in their associations. Target business development and content strategy to plug the gaps.
Lack of sustainability plans by (Europeana project) aggregators	Project no longer exists causing storage of content and updating problems	high	Work with aggregators to solve the problems. Raise political awareness of the need for Aggregation and the benefits associated with in. Make use of EU
Users			
Low usage	Loss of support for Europeana as it fails to attract users	medium	Monitor and act on key issues
Communication & Marketing			
Media become negative towards Europeana	Damage to reputations. Senior staff distracted into firefighting	medium	Be prepared. Ensure good relationship and good communication with key media players and other allies.

B3.2c. Project management

Led by the Europeana Foundation Office, WP8 provides the management, co-ordination and residual evaluation activities and the leadership and monitoring activities necessary in an extensive action of this kind. It will ensure the technical and legal compliance of the consortium in its contract with the Commission; manage overall the finances of the project; ensure that the consortium is effectively managed and coordinated internally in order to optimise its performance, meet its objectives and produce its agreed deliverables; assure overall the quality of the work of the consortium and the fitness for purpose of its deliverables. The coordinator and many of the network members have worked together before so the network benefits from (but does not rely only on) good personal relationships from the outset.

B3.2a. Chosen approach

Governance of Europeana

The Foundation believes that the governance of Europeana should come from its major, long term, persistent stakeholders, the content providers. They have the public responsibility – usually enshrined in their founding charters - to give access to their collections and maintain them for future generations. The current governance structure has been arrived at after much debate with all the stakeholders, the content providers, ministries of culture and education, the users, and the parts of the Commission.

In mid 2010 its structure is as follows:

An **Executive Group** of nine elected from a **Supervisory Board of Directors** of pan-European Associations of cultural institutions of content holders, including six elected members from a **Council of Content Providers and Aggregators** of all interested holders of content, commercial and public, across Europe. The Council is mandated to form ad hoc working groups needed to ensure continued buy-in and innovation from the individual institutions.

Externally there is a **Funding and Orientation Group** run by the Commission to ensure knowledge transfer and active participation by the ministries of culture and education in member states.

The Europeana Foundation is a legal entity under Dutch Law – this allows wide inclusiveness with strong, democratic representation but with the legal and financial responsibility vested in a few individuals who make decisions for the effective running of Europeana's business in a fast moving environment.

The Supervisory Board of Directors is conceived to be representative of their members' wishes and to be able to communicate from the Foundation out to their membership. The Supervisory Board of Directors will also therefore be naturally limited in membership by the number of pan-European Associations of cultural institutions in existence. From the Supervisory Board of Directors an Executive Group is elected. This group is legally and financially responsible for the Foundation. This group makes the regular decisions on behalf of the Board.

To encourage enthusiasm and wide participation from individual content providers and aggregators such as national portals a new body has been inaugurated, the Council of Content Providers and Aggregators. This body elects six of its own officers who will also serve on the Supervisory Board of Directors.

To encourage support, both financial and practical, at country level, a Funding and Orientation Group has been set up by the Commission. This is made up of the Member States and Ministry representatives. This group is responsible for advising the Europeana Foundation Board on budgetary and strategic matters and ensuring that all is in line with national policies.

Primary governance of Europeana is by the Europeana Foundation. The Europeana Foundation will therefore also be the Steering Group of Ev2. Similarly to v1.0, the Europeana Foundation managed risk and controlled the finances of the project as well as acting via its Board members as promoters of Europeana to all cultural

heritage organizations in Europe who are members of these organizations. The Foundation Supervisory Board meets twice a year and its Executive holds virtual meetings 10 times a year.

Organisational aspects of Ev2 management have been covered in section B3.2a. The daily management of Europeana will be by the Europeana Management Team, consisting of the Executive, Business and Technological Directors and the Financial Controller of the Europeana Office plus the Europeana Programme Manager. This team meets every 2 weeks.

A Project management board will add the final layer of governance in the project, ensuring that all partners are fully apprised of developments and meet their own deadlines. The project management board will meet virtually 3 times per year and physically once. The partners in Ev2 and the Europeana Management Team will form the Project Management Board of Ev2

Programme Management

Ev2 is one of 16 projects in which Europeana is directly involved. Managing these projects so they deliver content and technologies in a timely and cost effective manner to Europeana, requires a programme management approach. This allows gaps and risks to be identified and managed. Work package 8 of Ev2 supports the Programme Management of Europeana, whilst delivering on the specific project targets of Ev2.

Quality assurance and risk management

To better ensure agreed standards of quality a **Quality Plan** and Quality Register for deliverables and milestones will be developed. The Register will include the basic content outline of the deliverable or milestone, time schedules, review status, sign-off, etc. Quality control of deliverables and certain milestones will be undertaken by reviewers with the appropriate neutrality and expertise defined in the Quality Plan set up at the beginning of the project. No-one will be asked to review deliverables for which they are responsible. These comments will be taken into account when finalising the deliverables.

Requirement specifications and quality objectives will be clearly defined and documented. Responsibilities and authorities will be clearly defined. The work programme allocates clear, single-organisation, responsibility for each task. Development, quality, testing, configuration, acceptance and maintenance plans will be defined and controlled. Agreed definitions of procedures for acceptance and quality control will be established. Appropriate tools for planning, monitoring and progress reporting will be used.

A **risk management strategy** will be developed based on lessons learnt in v1.0, and a risk register will be maintained and updated throughout the project's lifecycle. This will be tabled at Board Meetings for review and addition. A contingency plan will also be developed to address key risks. WP leaders will be encouraged to maintain an issue log although WP8 will maintain one centrally.

Internal communication mechanisms for project management

Maintenance of the project workspace and collaborative tools is the responsibility of WP8. WP8 will develop with WP4 the tools for project collaboration, for the exchange of information on project outputs and progress amongst project partners, e.g. as a collaborative online workspace incl. document store, wikis, mailing lists and other democratic media where appropriate using lessons learnt in Europeana v1.0. These tools must work within the environments currently in place at the Office. Good communication will be at the heart of the network. Email lists will be established for specific groups of network members as required for good management and all project documents will be available to download from the network's website. Other communication tools will be used as required, including teleconferencing.

The key project management communication activities, in summary are:

- Creation of and maintenance of mailing lists
- Development of and maintenance of the collaborative online project workspace
- Arrangement of tele/skype conferences
- Organisation of workpackage meetings both physical and virtual where necessary
- Organisation of Project Management Board meetings both physical and virtual and associated documentation

Management & Reporting

Ev2 will provide the funding for about 75% of the operational service Europeana.eu and its central office. The 'project' has been constructed to reflect the internal business units and normal management and reporting of the Europeana Office to the Europeana Foundation. The overall management resides with the Europeana Management Team, under its Executive Director, who is responsible to the Europeana Foundation. Ev2 should support the internal business structure of the Europeana Office and work within its management and reporting structures to prevent duplication of effort.

By management of the whole programme, (i.e. all projects Europeana is involved in) the Europeana Office will reduce overhead and manage risk both financial and project based more effectively.

Project Reporting

Ev2 will make use of the normal business reporting of the Europeana Foundation. Therefore the Annual and Interim reports of the Europeana Foundation will form the base reporting and deliverables for all work packages Ev2. These reports cover all the activities of the Europeana Office, in all of its projects. They include the budgets and audited accounts for the total set of projects.

This approach reduces overhead for Europeana and allows the Commission to have overall control of the activities of Europeana as well as ensuring that the Europeana Foundation has a full overview of its business

A set of specific progress reports on Ev2 could be offered as part of good practice in project management. These would be milestones and contribute to the aforementioned Annual and Interim reports of the Europeana Foundation. The progress reports will report on deviations from plans in the Description of Work, the KPI's and project finances and will be short.

WP8 provides the programme management for Europeana Foundation but also ensures that Ev2 meets all of its targets and deliverables. It will therefore:

- programme manage all the projects of the Europeana Office,
- project manage Ev2 ensuring communication via meetings and teleconferences of external task and work package leaders with internal work package leaders
- report to the EC on project progress and finance according to reporting requirements

B3.3. Resources to be committed

For thematic Networks funded on the basis of **actual cost** (objectives 2.1 and 3.2b):

The budget meets 75% of the requirements for running an operational service. It covers staff costs, IT hosting, Thematic Network meetings and travel costs and the costs of marketing the service including conferences. This will be managed by the dedicated financial controller and as part of programme management to ensure non duplication of costs and effort across all 15 plus Europeana projects. Until the totality of what has been successful under this call is known it is difficult to know how tight this budget will be. If successful, Ev2 will double check the budget against other projects it is involved in. The amount is additionally squeezed as the project needs to cover an additional 5 months prior to any more structural funding being able to start in 2014.

To meet the costs of Content Ingestion and additional development from projects as yet unknown, all projects asking for Europeana involvement have been asked to place some subcontracting money in their submissions. This is attractive for Europeana as it removes the need to raisematching funding and does not require partnership in the projects, thus reducing overhead.

Europeana is a fully functioning business with regular monthly staff and running costs. These are tightly controlled with regular reports to the Europeana Foundation. These reports will become part of the submissions and control of Ev2. Budget is controlled and reductions in expenditure made prior to any difficulties being encountered for the overall budget. Most of the costs in Ev2 are ongoing costs and therefore already mobilized. Resources that complement the EU contribution to date come from the fundraising activities of WP2 or Business Development. This money largely comes from Ministry contributions and needs to be at €500,000 per year to ensure all activities proposed can continue.

Actual monthly rates			
Participant no.	Participant organisation name	Number of person months	Average rate
1 (Co-ordinator)	Stichting European Digital Library	813.7	5816
2 (Participant)	British Library	23.2	6767
3 (Participant)	Österreichische Nationalbibliothek	4.5	9200
4 (Participant)	Humboldt-Universität zu Berlin	26	5000
5 (Participant)	Ministerio de Cultura	9	3200
6 (Participant)	Biblioteka Narodowa	6	2000
7 (Participant)	Stichting Nederlands Instituut voor Beeld en Geluid	25	5040
8 (Participant)	Institut National de l'Audiovisuel	6	8000
9 (Participant)	Consiglio Nazionale delle Ricerche	31	4871
10 (Participant)	Department of Tourism, Culture and Sport	6	6250
Total		950.4	Average €5756/month

Subcontracting

Europeana needs to employ specific expertise for short periods of time. This is the rationale behind the subcontracting requested in this proposal.

Development - experts in particular areas such as multilingual search and retrieval, are too expensive to employ long term and often only needed for short bursts of time. The development subcontracting costs are provision for this and Europeana will subcontract according to need. The relevant WP is WP6.

Interoperability – Europeana is required to make the projects and very diverse cultural institutions work interoperably with the other data in Europeana. It is difficult to predict the amount of work, so in addition to the Data Ingestion team a subcontract for an additional interoperability expert is required. WP5 is the workpackage concerned.

WP1 is the relevant WP for the following subcontracting costs. Usability is crucial for the success of Europeana.eu. Rather than bring this very specific expertise in house, Europeana will subcontract it for take up at appropriate timings in the release schedule.

Log File analysis. This continues the analysis on user behaviour currently undertaken in EuropeanaConnect. Log file analysis gives insight into user behaviour that ensures user centric development of the portal. This specialist expertise will be subcontracted.

Editorial – to create virtual exhibitions and showcase the content of Europeana, developing more entry, browse points some curation and editorial input is needed. This input depends on the subject matter being exposed e.g. Art Nouveau requires a different expert to the Great War. Europeana will subcontract in order to get the best expertise for the subject at hand.

Subcontracts				
Participant no	Short name	Description Subcontracts	Amount	WP concerned
1	Europeana Foundation	Developers for specific expertise	300,000	WP6
1	Europeana Foundation	Interoperability consultancy	50,000	WP5
1	Europeana Foundation	Usability Consultancy	51,000	WP1, 2 and 3
1	Europeana Foundation	Log file analysis	30,000	WP1, 2 and 3
1	Europeana Foundation	Editorial Consultancy	40,000	WP1, WP3

Other specific direct costs

The largest cost for Europeana is the hosting of the service, its development, testing, acceptance and production environments. A process of tender for all these has taken place under Europeana v1.0 and a continuation of these providers is envisaged under Ev2, provided the SLA's and KPI's are fulfilled. The contracts will be reviewed in 2012.

Within the IT costs, a provision is made for the outsourcing of the bulk of data ingestion. This would be managed together with the subcontracted costs requested from the content providing projects. Europeana Office is unable to grow more in numbers of personnel. It must therefore look for ways of expanding business and processes cost effectively, one of these is to outsource content ingestion to expert third parties.

Stress and regression testing of software for production environments is necessary to ensure a stable, robust service. Each release is subject to such testing and therefore the costs are covered here. According to best practice, it should not be done by internal developers as they are less likely to see the shortcomings of their own software. The relevant workpackages for these costs are: WP5 and WP6.

All websites need design overhauls every 2-3 years. 2011 will be the third year of operation under the current design, costs to cover this are accommodated here. To promote the site widely in the online world expertise is needed to from specialist organizations hence the high costs attributed to online marketing and advertising. Keeping abreast of market developments and user needs requires a continual market research programme covered here under other costs. Promotional materials are a necessity to ensure recognition of a professional organization. The relevant work package is WP1.

The thematic network meets regularly and forms "workgroups" that also meet. The costs of the Europeana Foundation Board meetings are also met under the projects. In addition several knowledge sharing workshops are envisaged. The relevant work packages are WP2, WP7 and WP4. WP4 also guards the Europeana brand and needs funds to undertake this.

The costs of the financial audit of Europeana and its projects have to be met somewhere. As Europeana is almost entirely funded by projects the cost of audit is covered here. Legal costs, international payment costs and membership fees are also needed. This is managed by WP8.

Foreign travel and subsistence is calculated on the basis of €800 per trip.

Other specific costs				
Participant no	Short name	Description Other specific costs	Amount	WP concerned
1	Europeana Foundation	Travel costs office for network and other meeting attendance	153,400	All
1	Europeana Foundation	Travel costs commuting office members	140,900	All
1	Thematic Network Partners	Network Travel Costs	290,000	All
1	Europeana Foundation	Testing software development	290,000	WP 5 and 6
1	Europeana Foundation	Software and licences	25,000	WP 5 and 6
1	Europeana Foundation	Web hosting and storage and backup and security and SLA	790,000	WP 5 and 6
1	Europeana Foundation	Domain names registration + maintenance	4,500	WP 5 and 6

1	Europeana Foundation	Outsourcing of Content Ingestion	350,000	WP 5 and 6
1	Europeana Foundation	Equipment CNR-ISTI (web hosting Eur. Labs)	20,000	WP 5 and 6
1	Europeana Foundation	Network Meetings	205,000	All
1	Europeana Foundation	Workshops	100,000	All
1	Europeana Foundation	Promotional Materials	60,000	WP1, WP4
1	Europeana Foundation	Fees, Audit, Legal and Intl. Payment costs [banks]	53,000	WP8, WP3
1	Europeana Foundation	Market Research	37,500	WP1
1	Europeana Foundation	Online Marketing	310,000	WP1
1	Europeana Foundation	Brand design update	25,000	WP1
1	Europeana Foundation	Website Development resulting from Usability and new features and functionality	70,000	WP 6
2	BL	Travel	12,000	WP4
3	ONB	Travel	14,000	WP7
4	HU Berlin	Travel	14,000	WP7
5	MCU	Travel	5,000	WP4
6	NLP	Travel	5,000	WP4
7	Beeld en Geluid	Travel	22,000	WP7
8	INA	Travel	6,000	WP3, WP4
9	CNR-ISTI	Travel	20,000	WP6, WP7
10	DeptTCS	Travel	6000	WP4